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West Germany

A STUDY OF THE INTERNATIONAL TRAVEL MARKET

UNITED STATES DEPARTMENT OF COMMERCE
UNITED STATES TRAVEL SERVICE
Research & Analysis Division

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West Germany

A STUDY OF THE INTERNATIONAL TRAVEL MARKET

Results of a national sampling survey among residents of West Germany, indicating their international travel habits and patterns, attitudes and preferences for foreign travel, and their demographic, psychographic, and trip characteristics.

Conducted by
Hay Associates
for

UNITED STATES DEPARTMENT OF COMMERCE
United States Travel Service
Research & Analysis Division

May 1978

U. S. Depository Copy

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I. INTRODUCTION

PURPOSE

The United States Travel Service commissioned Hay Associates, Inc., to conduct a personal interview survey of West German international travelers to obtain data regarding their travel habits and patterns. In addition, the survey investigated various socio-economic, demographic, and attitudinal factors of German international travelers during 1976.

While the survey encompassed both the German inter-continental and intra-continental travel markets, the primary emphasis was on German U.S.-bound international travelers.

METHODOLOGY

The population of the study was all German adults (18 or older) residing in major urban areas of Germany. Between November 1976 and February 1977, Cegmark International, Inc., Hay Associates' subcontractor for the field research portion of the study, completed some 2,512 interviews in Germany.

Respondent screening was accomplished by door-to-door interviews. Complete interviews were conducted either at the time of the screening or at an appointed time convenient for respondents. A disproportionate sampling methodology utilizing second level referrals was used to locate additional qualified respondents.

SCOPE AND LIMITATIONS

This survey, rather than attempting to cover the entire potential German international travel market, was specifically designed to analyze that segment of the total market with the greatest potential for purchasing long-haul international travel (and, more specifically, travel to the United States). Consequently, the survey was conducted in the following German regions: West Berlin, The South, Rhein Main, Rhein Ruhr, and The North.

Data presented in this report have been weighted, specifically in the combination of German travelers to U.S. and non-U.S. destinations to properly represent the total German international travel market. This weighting was to compensate for the over-sampling of the 1976 U.S.-bound travel market segment. The two sub-samples were weighted according to the proportions: .03 for travelers to the United States; and .97 for non-U.S. travelers. These figures represent actual market distributions.

A complete description of the sampling, weighting, and administrative procedures used in this study is presented in Appendix C, "Technical Notes." A copy of the English translation of the questionnaire is in Appendix D.

II. HIGHLIGHTS OF THE FINDINGS

During 1976 Germany represented the fifth largest source of international travelers to the United States and the third largest source of overseas travelers, following Japan and the United Kingdom. During that year, this country received some 366,000 German travelers, about 2 percent of the total German international travel market. These travelers spent an estimated $206 million during their stay in the United States. This figure, which represents almost two percent of the total German international travel expenditures in 1976, ranks Germany as the fourth most important source of U.S. tourist foreign exchange earnings.

Though the great majority of German international travelers visited short-haul destinations (chiefly within Europe) during 1976, the United States was the most frequently visited long-haul intercontinental destination.

Most 1976 U.S.-bound German travelers (86 percent) visited only the United States during their visits to this country; only 12 percent included travel to other foreign destinations such as Canada and Mexico in their trip itineraries. Approximately 55 percent of the German travelers to the United States took more than one international trip during 1976.

DEMOGRAPHICS

The majority (61 percent) of German travelers to the United States in 1976 were males. These travelers were relatively young, with a median age of 32 years, and 50 percent were single. Approximately 27 percent of the primary decision-makers for trips to the United States claimed to have a college or university level education, and slightly over a quarter (29 percent) were in up-scale professional, managerial, or executive occupations. The median annual household income for US-bound German travelers was about $15,560. The median size of the households was two persons, with 38 percent including at least one child.

TRIP CHARACTERISTICS

Prior Planning Time/Trip Arrangements

The majority of German visitors to the United States in 1976 began planning their trip well in advance of their departures. Thirty-three percent began planning their trips 2 to 4 months in advance, and 32 percent began making their trip plans over 4 months in advance. Only 9 percent planned their trips less than 2 weeks in advance. A significant proportion (52 percent) contacted travel agencies in making travel arrangements/booking their trips to the United States.

Types/Sources of Information

The types of travel information which German travelers to the United States found most useful in planning their trips included information about: Scenic places (57 percent); transportation schedules (41 percent); lodging (37 percent); travel arrangements (30 percent); restaurants (27 percent); and climatic conditions (25 percent). These travelers most frequently obtained information about the United States from: Friends and relatives (68 percent); travel agents (57 percent); print/visual media (50 percent); and airline offices (36 percent).

The sources of information seen as most useful included: Friends and relatives (84 percent); airline offices (69 percent); USTS offices (69 percent); tour operators (60 percent); and travel agents (56 percent).

Types of Fare Purchased

During 1976, German travelers to the United States

most commonly booked charter flights (34 percent) or regular economy fares (34 percent). Many, however, also purchased either tour packages (22 percent) or discount excursion fares (13 percent).

Seasonality/Length of Trips

The majority of German travelers to the United States in 1976 came either during the third (47 percent) or second (28 percent) quarters. The remainder traveled to this country during the fourth (43 percent) and first (12 percent) quarters.

The median duration of German round-trip travel to the United States was estimated at 28 days, of which 25 days were actually spent in this country.

Purpose of Trip

The most frequently cited reasons for German trips to the United States during 1976 were for vacations (57 percent). Additional travel motives included: Visiting relatives (34 percent); study or formal schooling (24 percent); visiting friends (20 percent); and business (13 percent).

Inclusive Tour Travel/Traveling Party Composition

During 1976 most German visitors to the United States traveled independently. Only 23 percent purchased inclusive tour packages.

These visitors generally traveled alone (37 percent) or in the company of one other person (32 percent). The accompanying party members were most often friends (43 percent), spouses (17 percent), or business colleagues (16 percent).

Activities Engaged In

German travelers to the United States during 1976 frequently indicated that they: *Met interesting new people* (87 percent); *experienced a new culture/lifestyle* (84 percent); *saw beautiful scenery* (85 percent); *visited places of significant historical interest* (61 percent); and *learned things helpful in their business and social life* (61 percent). Additionally, slightly over half of these travelers said that they *enjoyed exciting night life* (55 percent); *and purchased interesting gifts and souvenirs* (56 percent).

Modes of Accommodation/Transportation in the United States

Hotels/motels were primary accommodations (72 percent) for German visitors to the United States, although 58 percent stayed in private homes at some point in their trip.

The major modes of transportation used within the United States were: Secondary air transportation (42 percent); buses (39 percent for inter/intra-city transportation); personal cars of friends or relatives (33 percent); rented cars (28 percent); and taxis (24 percent).

Trip Expenditures/Spending in the United States

The average cost for an adult German traveler's entire trip to the United States in 1976 was estimated at $1,220, of which an estimated $540 was spent while in this country. Independent travelers spent slightly more with total trip cost estimated at $1,270, of which $605 was spent in the United States. German inclusive-tour travelers spent somewhat less, with total trip expenditures estimated at $1,055, including $700 for the basic tour cost, and an additional $335 spent while in this country.

Slightly more than half (54 percent) of these German visitors used travelers checks to cover all or part of their trip expenditures.

Apart from food and lodging, which represented 35 percent of the average German traveler's spending in the United States in 1976, other significant expenditures were: Secondary transportation (25 percent); gifts and souvenirs (17 percent); and entertainment expenses (15 percent).

PREFERENCE FOR THE UNITED STATES/DESTINATIONS IN THE UNITED STATES

Sixty-one percent of U.S.-bound German travelers in 1976 chose the United States as the country which they would like most to visit again. Additionally, in investigating perceived tourist attractions, respondents were asked to name the country to which they would most like to travel in order to engage in or experience specific tourist activities. Responses indicated that both the U.S. and non-U.S.-bound German travelers viewed this country as a place to visit: *For business and social learning; meeting interesting new people; enjoying an exciting night life, restaurants, and entertainment; experienging a new culture or way of life;* and *seeing beautiful scenery.* On the other hand, German

travelers did not view the United States as a destination for: *Getting a bargain-priced vacation* or *participating in winter sports and activities.*

Regions preferred by German travelers for future visits to this country included (as first choices): The Far West (46 percent); the South (18 percent); and the Eastern Gateway (10 percent). The U.S. regional destinations which they most frequently visited during 1976 were: The Eastern Gateway (53 percent); the Far West (40 percent); and the South (22 percent). (Profiles of the travel markets to individual U.S. regions are presented in Section III.) The most frequently visited cities/attractions in the United States were New York City (46 percent); San Francisco (22 percent); Los Angeles (20 percent); Las Vegas (10 percent); Chicago (8 percent); Washington, D.C. and Boston (each with 8 percent); and San Diego and the Grand Canyon (each with 7 percent).

BICENTENNIAL INFLUENCE

A small but significant portion (15 percent) of German visitors to the United States during 1976 indicated that the U.S. Bicentennial celebration influenced the specific planning of their U.S. trip itineraries.

PROBLEMS/DIFFICULTIES ENCOUNTERED

Relatively few German travelers to the United States in 1976 encountered major problems or difficulties. Among those who did, the most commonly mentioned were: High cost/expensiveness (cited by 30 percent); fear for personal safety (14 percent); inadequate information/facilities (12 percent); entry difficulty and overcrowding (11 percent); and poor weather conditions (8 percent).

III. DISCUSSION OF THE FINDINGS

FREQUENCY OF INTERNATIONAL TRAVEL FROM GERMANY

The majority of German international travelers (62 percent) took only one international trip during 1976. Those who came to the United States for business purposes tended to travel more frequently than those who came for other purposes.

Table 1 summarizes international travel from Germany in 1976.

INTERNATIONAL DESTINATIONS OF GERMAN TRAVELERS

European countries are traditionally the most popular destinations for German international travelers. Spain, Italy, France, and Austria were among the most frequently visited Continental destinations by German travelers during 1976. The United States, on the other hand, was their number-one long-haul intercontinental destination during that year..

In 1976, the United States received approximately 366,000 German visitors, or 2 percent of the estimated 20 million German citizens who traveled abroad during the year. In addition, U.S. receipts from these foreign travelers equaled an estimated $206 million or approximately 2 percent of the total German international travel expenditures in 1976.

Most German travelers to the United States in 1976 visited only this country (88 percent). An estimated 12 percent traveled to other countries either before or after visiting the United States. Regions outside the United States visited most often in conjunction with a trip to this country were Canada (7 percent), Central America (5 percent), and the West Indies (2 percent).

This difference may be partially explained by the varying proportions of German business and pleasure travel between the United States and Europe. Because the German vacation market to the United States is not as fully developed as it is within Europe, proportionally more German business travelers visited this country than traveled to intracontinental destinations during 1976.

Table 1. Frequency of International Travel From Germany, 1976 Trips

International Trip Frequency	Travelers to the USA	Non-USA Travelers		Total International travelers
		Inter-continental	Intra-continental	
(Base)	(406)	(93)	(2,013)	(2,512)
1 trip	45%	44%	63%	62%
2 trips	28	22	23	23
3 trips	11	15	10	10
4 or more trips	16	19	4	5

NOTE: A Total of 406 respondents who had traveled to the United States in 1976 were surveyed. These travelers took over 885 international trips during the year. The information in this study is based on the respondents' most recent trip to the United States.

DEMOGRAPHIC CHARACTERISTICS OF FRENCH INTERNATIONAL AND DOMESTIC TRAVELERS

In analyzing the market segments among German international travelers, similarities and differences in traveler characteristics are noteworthy, as a high correlation is often observed between various demographic characteristics and the pattern of travel consumption. This study investigated the following demographic characteristics: Sex, age, marital status, education, occupation, language capability, annual family income, and the size and composition of the household.

Sex

Male travelers were slightly more prevalent among German visitors to the United States (61 percent) and other long-distance destinations (57 percent) than among German travelers to short-haul European destinations (52 percent).

Age

German travelers to the United States were somewhat older (with a median age of 32 years) than German travelers to non-U.S. destinations—ranging from 27 years of age to European destinations to 31 years of age to long-distance destinations. As might well be expected, German business travelers to the United States were somewhat older (with a median age of 42 years) than vacation travelers (31 years) or those visiting friends and relatives (35 years).

Marital Status

The proportion of married German international travelers who visited the United States in 1976 (50 percent) was somewhat less than that of those who visited other long-distance destinations (57 percent) or short-haul destinations (53 percent).

The percentages of married German travelers to the United States also varied considerably within various market segments. For example, although 80 percent of all business travelers were married, only 48 percent of all vacation travelers and 45 percent of travelers who came to visit friends and relatives were married. Additionally, whereas 12 percent of the German youth market (18-30 years of age) were married, approximately 73 percent of the middle aged (31-60 years old) and 61 percent of senior citizens (over 61 years old) fell in this category.

Education

The primary decision makers for German international trips to the United States were somewhat better educated than the overall international traveling population. Twenty-seven percent of the U.S.-bound German travelers had college or university level educations compared to 25 percent of travelers to other intercontinental destinations and 18 percent of short-haul continental travelers.

In analyzing education in terms of market segments, it is noteworthy that, although nearly 53 percent of all German business travelers to visit the United States in 1976 had college or university level educations, only 24 percent of German vacation travelers and 16 percent of those who came to visit friends and relatives fell in this category.

Occupation

In 1976, the largest proportion of German international travelers who were primary decision makers were employed in clerical positions (31 percent) or were professionals, executives, and managers (24 percent). Students were the third largest occupational category of German travelers to the United States, representing 14 percent of the total.

Predictably, a much higher percentage of German business travelers to the United States (63 percent) belonged to the professional, executive, and management category than did vacation travelers (25 percent). Additionally, where nearly 40 percent of the German middle aged travelers were employed in professional, executive, or managerial capacities, less than 20 percent of German youth travelers belonged to this up-scale segment. It is interesting to observe that a higher proportion of German travelers in the executive/professional category purchased inclusive tours (24 percent) than did either clerical workers (17 percent) or students (16 percent).

Annual Household Income

The median annual household income of German travelers to the United States during 1976 (estimated at $15,560) was nearly 24 percent higher than that of the overall German international travel market (estimated at $12,585).

In correlating annual household income to purpose of trip, German business travelers to the United States, predictably, had the highest annual household income, with 65 percent earning in excess of $18,650 and 46 percent earning more than $23,315. On the other hand, only about 36 percent of the German vacation travelers to the United States, and fewer than 26 percent of those who came to this country to visit friends or relatives had household incomes in excess of $18,650.

Parenthetically, it is interesting to note that whereas a somewhat higher proportion of German middle-aged travelers (40 percent) had household incomes in excess of $18,650 than did German youth travelers (34 percent), proportionally over twice as many German youth travelers (19 percent) had annual household incomes in excess of $32,640 than did their middle-aged counterparts (9 percent).

Size and Composition of Households

The average German traveler to the United States in 1976 belonged to a three-person household. The majority of those households were mainly comprised of adults, with 62 percent reporting no children under 18 years of age, and 19 percent indicating they had only one child. Thirteen percent reported having two children in their household, and 5 percent contained three to five children. A somewhat higher percentage of business travelers were members of households with children (58 percent) than were vacation travelers (36 percent) or those who came to visit friends or relatives (30 percent).

The household size of German non-U.S. intercontinental and intracontinental travelers also averaged 3 persons, and the majority (63 perrent for non-U.S. intercontinental travelers and 61 percent for intracontinental travelers) contained no children under 18 years of age.

Also, a larger proportion of independent travelers (66 percent) than inclusive tour travelers (51 percent) came from households containing no children under the age of 18 years, and more female (67 percent) than male (59 percent) respondents fell into this category.

Foreign Language Capability

Caution should be used in reviewing this percentage as respondents generally tend to overstate their English language capability. Furthermore, the question was not phrased to determine the degree of their English language fluency.

When asked to indicate if they could read or speak different foreign languages, a considerably larger proportion of German travelers to the United States and other long-distance destinations said they could speak or read English (each 84 percent) than did German intracontinental travelers (67 percent).

Business travelers to the United States reported the greatest competency in speaking or reading English, with 96 percent claiming this ability. In terms of regional analysis, the capacity of German travelers to read or speak English varied from 84 percent among those who visited the South to 94 percent among those who traveled to the Frontier West. Furthermore, a somewhat greater proportion of male (88 percent) than female (77 percent) and youth (99 percent) than middle aged (82 percent) German travelers to the United States could read or speak English.

Summary of Demographic Characteristics

The majority of travelers to the United States in 1976 were male, in their early thirties, married, with high school or higher educations employed in upscale occupations, relatively affluent, members of households containing three persons, and capable of speaking or reading English. Table 2 presents a summary of the demographic characteristics of German international travelers.

CHARACTERISTICS OF GERMAN INTERNATIONAL TRIPS

In analyzing German international travel in 1976, this section examines the travel process from initial planning and organization through the actual trip.

Travel Planning/Purchase Patterns

1. *Prior Planning Time*—Approximately 50 percent of all German international travelers started making specific trip plans at least 2 months prior to departure. Travelers to the United States and to other long-distance destinations followed the same pattern except that a smaller proportion of visitors to these areas planned their trips less than 2 weeks in advance (9 percent and 11 percent, respectively) than did travelers to short-haul, European destinations (15 percent).

Table 2. German Traveler Characteristics, 1976

Travelers Characteristic	Total Travelers to the USA	Non-USA Travelers: Inter-continental	Non-USA Travelers: Intra-continental	Total International Travelers
	(406)	(93)	(2,013)	(2,512)
Sex [1]				
Male	61%	57%	52%	52%
Female	39	43	48	48
Age [1]				
Median number of years	32	31	27	28
Marital Status [2]				
Married	50%	57%	53%	53%
Unattached	50	43	47	47
Education [3]				
Grammar School	23%	19%	32%	32%
Junior High School	18	24	21	21
High School/Junior College	23	25	20	20
Technical/Vocational	9	8	9	9
College/University	27	25	18	18
Occupation [3]				
Professional/Executive	29%	31%	24%	24%
Clerical	21	23	32	31
Student	13	13	14	14
Sales independent merchant	10	8	8	8
Self employed	8	11	3	4
Retired/Unemployed	7	4	5	5
Other	11	11	14	14
Annual Household Income [2]				
$9,325 or less	21%	24%	31%	30%
$7,326-13,989	21	17	29	29
$13,990-18,652	22	21	20	20
$18,653-23,315	12	18	10	10
Over $23,316	23	20	11	11
Median household income	$15,560	$16,060	$12,450	$12,585
Size of Household [2]				
1 person	19%	22%	19%	19%
2 persons	26	29	29	29
3 persons	23	16	23	22
4-6 persons	32	32	29	29
Over 7 persons	1	*	1	1
Median number of persons	2.2	2.0	2.1	2.1
Average number of persons	2.8	2.8	3.0	3.0
Children under 18 in Household [2]				
No children	62%	63%	61%	61%
1 child	19	16	21	21
2 children	13	18	14	14
3 or more	6	2	4	4
Language Capability [2]				
Speak or read English	84%	84%	67%	68%

NOTE: Percentages may not add to 100% due to rounding.

[1] Computed for members of entire traveling party.

[2] Reflects data concerning the respondent.

[3] Reflects data concerning the primary decision-maker for the trip.

*Less than 0.5 percent.

There were marked variations in trip planning time among specific market segments of German travelers to the United States. Business travelers, for example, tended to have a much shorter lead time in planning their trips than did vacation travelers or those who visited friends or relatives. Approximately 33 percent of business travelers planned their trips less than 2 weeks prior to departure, compared to 6 percent for vacation travelers and 5 percent for those who came to visit friends or relatives.

2. *Use of Travel Agency and Other Travel Arrangement Contacts*—Slightly fewer German travelers to the United States and other long-distance destinations used travel agencies (each 52 percent) than did German short-haul travelers (62 percent). Conversely, a higher proportion of travelers to the United States (24 percent) and other intercontinental destinations (20 percent) used transportation carriers than did German travelers to short-haul destinations (10 percent).

Among German travelers to the United States, the most frequent users of travel agencies were:

—Travelers to the South, Frontier West, Far West, and Eastern Gateway
—Vacation travelers (60 percent)
—Travelers visiting friends/relatives (55 percent)
—Business travelers (48 percent)
—Independent travelers (55 percent)
—Female travelers (55 percent)

Germans tended to use travel agencies in planning their trip to the United States chiefly for: Arranging primary transportation (92 percent); furnishing information (47 percent); arranging lodging (19 percent); and providing inclusive tour packages (14 percent). It should also be noted, however, that many German travelers to this country made their own specific arrangements for sightseeing (54 percent), lodging (39 percent), and car rentals (25 percent).

3. *Types/Sources of Information*—German travelers planning trips to the United States generally were most helped by information about: Scenic places to visit (57 percent); transportation schedules (41 percent); lodging (37 percent); travel arrangements (30 percent); restaurants, night life, and entertainment (27 percent); and climate (25 percent). Proportionally more U.S. and non-U.S. intercontinental travelers (41 percent and 47 percent, respectively) found information about transportation schedules helpful than did short-haul intracontinental travelers (14 percent). Conversely, a smaller percentage of Germna travelers to the United States (37 percent) or other intercontinental destinations (41 percent) found information about lodging and accommodations helpful than did German intracontinental travelers (60 percent).

Predictably more vacation travelers (61 percent) than business travelers (34 percent) to the United States found information about scenic places helpful. Also, it is not surprising that a larger percentage of independent travelers (48 percent) than inclusive-tour travelers (14 percent) considered data about transportation schedules the most helpful type of information.

The sources of information most frequently used by German travelers to the United States were word-of-mouth information from friends/relatives (68 percent); information furnished by travel agents (57 percent). Information from friends and relatives received the highest proportion of "good" ratings (84 percent) by those who relied upon this source. USTS offices, airline companies, and tour operators also received high ratings as sources of "good" information (over 60 percent each).

4. *Type of Fare Purchased*—Most German travelers to the United States primarily booked either regular economy/coach or charter passage (34 percent each). Twenty-two percent bought tour packages; 13 percent purchased discount excursion fares; and 4 percent paid for first-class passage to this country.

Travelers to non-U.S. intercontinental destinations were much like those traveling to the United States, except a larger proportion utilized regular economy or coach fares (41 percent) and tour packages (30 percent), and a smaller percentage flew on charters (24 percent). Over three times as many U.S.-bound German travelers purchased charters (35 percent) as did intracontinental travelers (15 percent). Nearly three times as many travelers to short-haul destinations booked tour packages (60 percent) as did those who visited the United States (22 percent).

A much larger percentage of U.S.-bound business travelers purchased regular economy fares (82 percent) than did those who came for vacations (26 percent) or to visit friends and relatives (41 percent). Furthermore, nearly twice as many travelers who went directly to transportation companies pur-

chased regular economy fares to the United States (60 percent) than did those who booked their passage through travel agencies (32 percent). Conversely, more than three times as many U.S.-bound travelers who used travel agencies booked charter passage (80 percent) than did those who went directly to transportation companies (13 percent).

Caution should be used in interpreting the data concerning the type of fares purchased by German travelers, as respondents may not have been fully aware of the distinction between various types of transportation fares and may not have been sure as to the classification of their own tickets.

Table 3 summarizes travel planning and purchase patterns for German international trips.

Seasonality of Travel

The seasonal pattern of German travel varied widely among the different sub-market categories. For example, German visitors to the United States and to intracontinental destinations traveled most frequently during the third quarter (47 percent and 62 percent, respectively), but Germans traveled to non-U.S. long-distance destinations most often during the second quarter (29 percent). Also, while about 25 percent of German travelers to non-U.S., long-haul destinations began their trips during the first quarter, only half as many (12 percent) of those who visited the United States and a fifth as many (5 percent) short-haul travelers began their trips at this time of the year.

The highest percentage of U.S. trips for all purposes were during the third quarter. It is noteworthy, however, that considerably more business travel (22 percent) occurred in the fourth quarter than did vacation travel (9 percent) or trips to see friends or relatives (8 percent).

Length of Trip

The median round-trip duration for all international travel from Germany was 18 days. Most trips (68 percent) lasted between 8 and 21 days. The median round-trip duration of German trips to both the United States (28 days) and other long-haul destinations (23 days) was somewhat longer than that of German travelers to short-haul destinations (18 days).

German travelers spent a median of 25 days in the United States, with the majority (51 percent) staying between 15 and 28 days. Business travelers (with median stays of 13 days) spent considerably less time visiting this country than did vacation travelers or those who came to see friends or relatives (each with median stays of 28 days). The median stay of non-tour travelers in the United States (28 days) was considerably longer than that of inclusive-tour travelers to this country (20 days). German youth travelers stayed longer than did middle aged travelers (28 median days vs. 21 median days), but spent less per day ($21 vs. $36).

A tabular summary of the seasonality and duration of German international trips is presented in Table 4.

Purpose of Trip

The majority of German travelers (57 percent) to the United States came for vacations. This figure is comparable to the market proportion of German long-haul, vacational travelers to other intercontinental destinations (60 percent), but considerably smaller than that of short-haul travelers (88 percent).

Other principal motivations for German travel to the United States in 1976 included: Visiting relatives (34 percent); study or formal schooling (24 percent), visiting friends (20 percent), and business (13 percent). Slightly fewer German travelers to non-U.S. intercontinental destinations cited visiting relatives (18 percent) as their trip purpose, and only 7 percent of the short-haul travelers gave this reason for traveling. Proportionally more German travelers visited the United States for business (13 percent) than did travelers to other non-U.S. long-distance (11 percent) or intracontinental destinations (2 percent).

More German travelers to the Eastern Gateway visited that region for purposes of studying and formal schooling (28 percent) than did travelers to any other region. Likewise, a greater percentage of German travelers visited the South for business (16 percent) than did those who traveled to other regions.

Though the 1976 German traveler was primarily attracted to the United States as a vacation spot, the various market segments differed considerably in expressed travel motives. For example, 19 percent of all male travelers cited business as the purpose of their visit to the United States, only three percent of all female travelers gave this reason for their visit. Conversely, more female (46 percent)

Table 3. Travel Planning Purchase Patterns of German Trips, 1976

	Trips to the USA	Non-USA Trips: Inter-continental	Non-USA Trips: Intra-continental	Total International Trips
(Base)	(406)	(93)	(2,013)	(2,512)
Prior Planning Time				
Under 2 weeks	9%	11%	15%	15%
2 weeks to 4 weeks	11	5	17	17
1 month to 2 months	15	23	19	19
2 months to 4 months	33	23	25	25
4 months to 6 months	17	17	14	14
6 months or more	15	22	10	11
Organization Used in Trip Planning/Booking [1]				
Transportation carrier	24%	20%	10%	11%
Travel agency	52	52	62	61
Travel club	10	7	10	10
Tour operator	12	12	14	14
Other	9	9	6	6
Most Helpful Type of Trip Planning Information[1]				
Scenic places	51%	58%	51%	51%
Transportation schedules	41	47	14	16
Lodging/prices	37	41	60	59
Internal travel arrangements	30	29	14	14
Restaurants/prices	27	15	36	35
Climate	25	33	51	50
Fare packages	18	18	15	15
Exchange rates	17	13	23	22
Customs	16	27	14	15
Tour group availability	15	8	10	10
Sources of Information About the United States[1]				
Friends or relatives	68%	([2])	([2])	([2])
Travel agent	57			
Print/visual media	50			
Airline Co. offices	36			
Tour operator	32			
Advertising	22			
USTS office	19			
Embassies	11			
Type of Fare Purchased[1] (Base)	(405)	(90)	(788)	(1,283)
First class	4%	4%	3%	3%
Regular economy	34	41	19	21
Discount excursion	13	12	9	9
Charter	34	24	15	16
Tour package	22	30	60	56

NOTE: Percentages may not add to 100% due to rounding.

[1] Multiple responses—percentages may add to more than 100%.

[2] Not applicable.

than male (25 percent) visitors traveled to the United States to see relatives. A larger percentage of non-tour German travelers (15 percent) came to this country for business reasons than did inclusive-tour travelers (3 percent). On the other hand many more inclusive-tour travelers (53 percent) than "independent" travelers (16 percent) came to the United States for formal schooling or studies.

Table 4. Seasonality and Length of German Trips, 1976

	Trips to the USA	Non-USA Trips: Inter-continental	Non-USA Trips: Intra-continental	Total International Trips
(Base)	(406)	(93)	(2,013)	(2,512)
Seasonality				
First quarter	12%	25%	5%	6%
Second quarter	28	29	23	24
Third quarter	47	28	62	61
Fourth quarter	13	18	9	9
Length of Round-Trip				
7 days or less	8%	1%	7%	7%
8 to 14 days	14	14	33	32
15 to 21 days	15	32	37	36
22 to 28 days	22	18	15	15
29 to 35 days	16	14	5	6
36 days or more	25	22	3	4
Median number of days	28	23	18	18
Length of Stay in USA				
7 days or less	14%	(1)	(1)	(1)
8 to 14 days	15			
15 to 21 days	16			
22 to 28 days	21			
29 to 35 days	14			
36 or more	21			
Median number of days	25			

NOTE: Percentages may not add to 100% due to rounding.

[1] Not available.

Inclusive-Tour Travel

Twenty-five percent of all German international travelers purchased inclusive-tour packages in 1976. Slightly fewer German travelers to the United States (23 percent) bought inclusive-tour packages than did either non-U.S. intercontinental (30 percent) or intracontinental travelers (25 percent).

More vacation travelers (22 percent) purchased tour packages than did either business travelers (6 percent) or those coming to the United States to visit friends and relatives (7 percent). In terms of regional analysis, proportionally more German travelers to the Eastern Gateway (27 percent) purchased inclusive tours than did travelers to any other region. Finally, a somewhat larger proportion of German travelers who planned their trips with travel agencies purchased package tours (18 percent) than did those who contacted transportation carriers directly (13 percent).

Size and Composition of Traveling Party

The majority of German international travelers either traveled alone (17 percent) or with one companion (39 percent). Thirty-seven percent of visitors to the United States and 36 percent of the travelers to non-U.S. long-distance destinations traveled alone, but only 16 percent of those who traveled to short-haul locations were unaccompanied.

Proportionally more German business travelers traveled alone (49 percent) than did vacation travelers (28 percent) or those who came to the United States to visit friends or relatives (45 percent). When not traveling alone, U.S.-bound German travelers were likely to be accompanied by friends (43 percent), spouses (17 percent), business colleagues (16 percent) or sons or daughters (8 percent).

Table 5 summarizes the preceding information on trip purposes, inclusive tour travel, and size and

composition of traveling parties in the German travel market.

Trip Activities or Experiences

The most popular trip activities among German travelers to the United States were: *Meeting new interesting people* (87 percent); *seeing beautiful scenery* (85 percent); *experiencing a new and different culture life style* (84 percent); and *visiting places of significant historical interest* (69 percent). Over half of the German visitors to the United States also indicated that they *learned things helpful in their business and social lives* (61 percent); *purchased interesting gifts/souvenirs* (56 percent); *enjoyed an exciting night life, good restaurants, and entertainment* (55 percent); *participated in warm weather sports or lay in the sunshine* (52 percent), and *experienced a bargain priced vacation* (52 percent).

German travelers to non-U.S. long-haul destinations also engaged in these same activities but generally indicated a somewhat higher degree of involvement. This is particularly true with respect to engaging in activities related to business and social learning (76 percent). On the other hand, proportionally fewer German short-haul travelers said they *met interesting new people* (77 percent), *experienced a new and different culture, visited places of significant historical interest* (58 percent); *learned things helpful in their business and social life* (41 percent); or

Table 5. Characteristics of German International Trips, 1976

Trip Characteristic	Trips to the USA	Non-USA Trips: Inter-continental	Non-USA Trips: Intra-continental	Total International Trips
(Base)	(406)	(93)	(2,013)	(2,512)
Purpose of Trip [1]				
Vacation	57%	60%	88%	87%
Visiting relatives	34	18	7	7
Study/formal schooling	24	28	8	4
Visiting friends	20	14	6	7
Business	13	11	2	2
Other	8	11	7	7
Inclusive-Tour Travel				
No	77%	70%	75%	75%
Yes	23	30	25	25
Size of Traveling Party				
1 Person	37%	36%	16%	17%
2 Persons	32	28	40	39
3 Persons	11	13	14	14
4 Persons	8	6	16	16
5 or more persons	12	17	15	15
Relationship of Party Members to Respondent [1]				
Spouse	17%	17%	23%	23%
Parent	4	7	3	3
Son/daughter	8	9	19	19
Granddaughter/grandson	*	*	*	*
Brother/sister	4	7	3	4
Other relative	5	3	4	4
Business colleague	16	12	2	3
Friend	43	46	44	44
Other	3	*	1	1

NOTE: Percentages may not add to 100% due to rounding.

[1] Multiple responses; percentages may add to more than 100%.

*Less than 0.5 percent.

purchased interesting gifts and souvenirs (46 percent) than did those who traveled to the United States. Conversely, a larger percentage of German travelers to continental European destinations *saw beautiful scenery* (93 percent) and *participated in warm weather sports* (70 percent) than did visitors to the United States.

An analysis of trip activities of the various market segments revealed that German travelers who visited this country for business reasons generally indicated a lesser degree of involvement in the various activities mentioned above than did vacation travelers or those who came to see friends and relatives. However, a greater percentage of business travelers claimed that they *met interesting new people* (92 percent) and *learned things that were useful in their business and social lives* (65 percent) than did the other two market segments.

Lodging Used

A large proportion (72 percent) of German travelers indicated that they stayed in hotel/motels during part or all of their visit to the United States. Fifty-eight percent stayed in private homes of friends or relatives. Somewhat fewer Germans visiting non-U.S. destinations stayed in hotel or motel accommodations (52 percent), and only 15 percent found lodging in private homes. This finding is partially attributable to the fact that fewer Germans traveled to non-U.S. destinations to visit friends or relatives than did U.S.-bound German travelers. The most frequent users of commercial accommodations were business travelers, males, inclusive-tour travelers, and travelers who used travel agencies in arranging their trips. A greater percentage of German travelers to the Far West used commercial accommodations than did travelers to any other region.

Secondary Transportation Used

The major modes of secondary transportation used by Germans traveling in the United States were: Secondary air (42 percent) and inter/intra-city bus transportation (39 percent). These were, in turn, followed by: Personal cars—either their own or those of friends (33 percent); rented cars (32 percent), and taxis (24 percent). A considerably higher proportion of business travelers used: Secondary air transportation (57 percent); taxis (43 percent); and car rentals (43 percent) than did travelers visiting friends/relatives (39 percent, 15 percent, and 25 percent, respectively). Conversely, a much larger percentage of travelers who came to the United States to visit friends/relatives used personal cars (50 percent) or bus transportation (31 percent) than did business travelers (28 percent and 18 percent, respectively).

In terms of regional analysis, fewer German travelers to the Frontier West (19 percent) or Far West (19) used taxis than did those who visited the Eastern Gateway (31 percent). On the other hand, proportionally more travelers to the Frontier West (50 percent) used rented cars than did those who traveled to the South (23 percent) or Eastern Gateway (30 percent). Also, a greater percentage of travelers to the South used personal cars (45 percent) than did travelers to any other region. It is not surprising that a greater share of independent travelers used personal cars (37 percent) or car rentals (33 percent) than did inclusive-tour travelers (21 percent and 9 percent respectively).

Table 6 summarizes trip activities engaged in and lodging and secondary transportation used by German travelers in 1976.

Trip Expenditures

The average per capita cost of a German trip to the United States was estimated at $1,220, of which $540 was spent in this country. The average total trip cost per non-U.S. intercontinental traveler was estimated at $1,440. Trip costs of an intracontinental traveler amounted to approximately $410.

German inclusive tour travelers to the United States (representing 23 percent of the overall market) paid an average of $700 each for their tour packages. During their stay in this country, these travelers spent an additional $335. Independent travelers (77 percent of the market) spent an average of $605 per adult while visiting the United States. Total per capita trip expenditures for inclusive tour travelers were about $1,055, compared to $1,270 for "independent" travelers to this country.

German tour travelers to non-U.S. intercontinental destinations paid somewhat more for their tour packages than did inclusive tour travelers to the United States. Specifically, inclusive-tour travelers visiting non-U.S. intercontinental destinations other than the United States (representing 30 percent of this market) had an average per capita tour cost of about $1,070. Short-haul travelers (25 percent of the

Table 6. Characteristics of the Trip, German Travelers, 1976

Trip Characters	Trip to the USA	Non-USA Trips: Inter-continental	Non-USA Trips: Intra-continental	Total International Trips
(Base)	(406)	(93)	(2,013)	(2,511)
Activities Engaged In [1]				
Met interesting people	87%	90%	77%	78%
Saw beautiful scenery	85	96	93	93
Experienced new culture/lifestyle	84	95	67	68
Visited places of significant historical interest	69	71	58	59
Learned new things helpful in one's business/social life	61	76	41	46
Bought interesting gifts/souvenirs	56	71	46	48
Enjoyed an exciting night life/good restaurants, etc.	55	55	45	45
Participated in warm weather sports/lay in the sunshine	52	63	70	70
Experienced a bargain priced vacation	52	58	62	68
Attended a Bicentennial event or site	27	45	23	24
Went camping	13	21	19	19
Went snow skiing	2	*	6	6
Participated in winter sports activities	2	3	6	6
Lodging Used [1]				
First class hotels	24%	39%	11%	12%
Other hotel/motel	48	30	40	40
Private home	58	42	15	16
Camping site	6	9	16	15
Other	16	22	33	32
Secondary Transportation [1]				
Air	42%	([2])	([2])	([2])
Boat	6			
Rail	7			
Personal car	33			
Bus	39			
Taxi	24			
Rental car	28			
Camper	5			
Other	5			

[1] Multiple responses; percentages may add to more than 100%.

[2] Not available/Not applicable.

*Less than 0.5 percent.

market) paid approximately $340 each for their tours.

German international travelers frequently used travelers checks to cover all or part of their trip expenses. Proportionally, more German travelers to the United States (54 percent) and to other long-distance destinations (56 percent) paid their travel expenses in travelers checks than did those who visited short-haul destinations (22 percent).

An analysis of expenses reported by German travelers to the United States indicated that food and lodging accounted for the largest share of their spending (35 percent), followed by secondary transportation expenditures (25 percent), gifts and souvenirs (17 percent), and entertainment expenses (13 percent). Primary expenditures of inclusive tour travelers in this country were for gifts and souvenirs (29 percent), while independent travelers allocated the largest proportion of their spending for food and lodging (37 percent).

The average trip expenditures varied among segments of the German travel market to the United

States. Business travelers spent the most, with an average per capita trip expenditure of $1,765, of which $810 was spent in this country. Travelers visiting friends or relatives predictably had the lowest per capita total trip expenditures estimated at $1,105, of which about $505 was spent while in this country. (International transportation costs were excluded from these figures).

Considerably higher-than-average total trip expenditures were reported by German travelers to the Frontier West Region ($1,560 per capita, of which about $805 were spent while in the United States), and the Far West ($1,480 per adult, of which some $725 were spent in this country).

In analyzing trip expenditures by traveler characteristics, it was observed that the average per capita total trip expenditure of German inclusive tour travelers to the United States (estimated at $1,055) was approximately 20 percent lower than that of independent travelers (estimated at $1,270).

Table 7 summarizes the data on German international travel-spending patterns.

PERCEPTIONS OF INTERNATIONAL TRAVEL DESTINATIONS AND GERMAN ATTITUDES TOWARD TRAVEL ABROAD

In this section, German travelers' perceptions of the United States as an international tourist destination compared to other countries are examined. Preferences for international destinations as well as German attitudes toward travel are also analyzed.

The Competitive Position of Major International Tourist Destinations

Respondents were asked to name the country to which they would most likely travel in order to engage in or to experience specific tourist activities. A series of 12 tourist expectation categories, representing a wide array of possible activities, were presented to the respondents. Many countries were named for each expectation, but the United States was chosen more frequently than any other country.

The United States ranked first among German international travelers (including both those who had

Table 7. Per Capita* Expenditures
(U.S. Dollars)

		Non-USA Travelers		
	Travelers to the USA	Inter-continental	Intra-continental	Total International Travelers
(Base)	(395)	(91)	(1,984)	(2,470)
Average trip expenditure	$1,220	$1,440	$410	$460
(Base)	(91)	(25)	(456)	(572)
Average tour price	$700	$1,060	$340	$380

	Total Travelers to the USA	Inclusive-Tour Travelers to the USA	Non-Inclusive Tour (Independent) Travelers to the USA
(Base)	(375)	(91)	(284)
Average expenditures in USA	$540	$335	$605
Additional transportation	24%	15%	26%
Lodging and food	35	20	37
Gifts and souvenirs	17	29	15
Entertainment	13	21	12
Miscellaneous (sightseeing, gratuities, etc)	11	15	10

* Per capita trip expenditure data reflect estimations of adult (over 18) respondents concerning trip spending for themselves only—not including other travel party members. All averages are based only on those respondents that could recall such expenditures.

visited the United States and those who had not) as a place *to learn things helpful in one's business/social life* and *to meet interesting new people*. Additionally, the United States ranked much more favorably with German travelers who had visited this country than among those who had not for the following activities: *To experience a different culture/way of life; to enjoy an exciting night life/good restaurants/entertainment; to see beautiful scenery; to meet interesting new people; to purchase interesting gifts and souvenirs; to participate in warm weather sports and lie in the sunshine; to experience a relaxing atmosphere; to participate in outdoor activities like hiking and camping.*

On the other hand, the United States received relatively little mention as a place: *To visit places of significant historical interest; to get a bargain-priced vacation; to participate in winter sports and activities.*

German travelers' perceptions of competitive international destinations for the 12 tourist activities/expectations are summarized in Table 8, which presents the rankings of the top three countries as well as that of the United States (whether or not it was in the top three selections) for each activity.

Preferred International Destinations

When asked to name the country that they would most like to visit again, the United States was chosen most often (61 percent) by German travelers who had visited this country in 1976. Similarly, when German international travelers to non-U.S. destinations were asked to name the country that they would most like to visit but had not visited previously, the largest percentage (17 percent) also indicated the United States as their preferred destination choice.

Table 9 summarizes data concerning preferences for future international trips by German travelers.

German Attitudes Toward Travel

A new area investigated by this study was that of attitudinal characteristics, or *psychographics,* of German international travelers. This phase of the research was conducted to obtain some indication of the "why" of travel buying behavior among different market segments. By analyzing attitudes toward certain determinants of the travel product, it will be possible to further identify high potential markets. By analyzing why different travelers buy certain travel products (travel to a certain destination; inclusive tour travel), promotional efforts can be developed to reach and motivate the particular market segment(s) being sought.

To gather data on the travel attitudes of various market segments, a series of travel related, motivational scalings were developed to measure how the German traveler either agreed or disagreed with the attitudinal statements. Data presented here represent proportions of German travelers who agreed ("somewhat agree" and "strongly agree") with each psychographic statement. Table 10 presents the findings.

THE UNITED STATES AS A TRAVEL DESTINATION

Preferred Destinations in the United States

All respondents, whether or not they had ever visited the United States, were asked what area (a selection was provided) they would most like to visit (or revisit) in this country. They were then asked their second and third preferences.

The Far West was the most popular U.S. destination chosen by 46 percent of the German visitors to this country in 1976. The South with 18 percent, the Eastern Gateway region with 10 percent, and the Frontier West with 7 percent were the next most frequently mentioned first-choice destinations. These regional rankings were relatively similar with German travelers who had and who had not visited the United States.

Comparatively little change was seen in the relative ranking of regional preferences when first, second, and third choices were aggregated. The Far West region and the South maintained their respective first and second position. The Frontier West replaced the Eastern Gateway in third position.

Table 11 summarizes German travelers' regional destination preferences in the United States.

Destinations Actually Visited by German Travelers to the United States

German travelers who had visited the United States in 1976 were shown a map of the country and were asked to identify the destinations they had visited during their trips. The largest proportion indicated that they had visited the Eastern Gateway (53 per-

Table 8. Top Three Country and U.S. Selections For 12 Travel Expectations

	Travelers to the USA	Non-USA Travelers		Total International Travelers
		Intercontinental	Intracontinental	
To experience a different culture or way of life	USA (32%) Greece (8%) Japan (5%)	USA (4%) Greece (4%) Mexico (4%)	Greece (14%) France (9%) USA (8%)	Greece (13%) USA (12%) France (8%)
To enjoy an exciting night life/ good restaurants/dancing and entertainment	France (41%) USA (20%) Spain (6%)	France (33%) USA (9%) Spain (5%)	France (49%) Spain (13%) USA (6%) Italy (6%)	France (47%) Spain (12%) USA (8%)
To visit places of significant historical interest	Greece (34%) Italy (17%) USA (10%)	Greece (25%) Italy (13%) France (9%) USA (1%)	Greece (41%) Italy (18%) France (7%) USA (1%)	Greece (40%) Italy (18%) France (7%) USA (3%)
To see beautiful scenery	USA (31%) Switzerland (11%) Austria (7%)	Austria (12%) Switzerland (12%) USA (5%)	Austria (17%) Switzerland (13%) France (9%) USA (4%)	Austria (15%) Switzerland (12%) USA (8%) France (8%)
To meet interesting new people	USA (45%) France (9%) U.K. (6%)	USA (10%) France (9%) U.K. (7%)	France (15%) USA (8%) U.K. (10%)	USA (14%) France (14%) U.K. (9%)
To learn things helpful in one's business/social life	USA (44%) U.K. (3%) France (3%)	USA (16%) U.K. (4%) Japan (4%)	USA (17%) France (9%) U.K. (8%)	USA (21%) France (8%) U.K. (7%)
To get a bargain priced vacation	Spain (18%) Austria (16%) Italy (9%) USA (9%)	Austria (22%) Spain (17%) Italy (11%) USA (1%)	Spain (18%) Austria (16%) Italy (13%) USA (*)	Spain (18%) Austria (16%) Italy (12%) USA (2%)

Table 8. Top Three Country and U.S. Selections For 12 Travel Expectations—Continued

	Travelers to the USA	Non-USA Travelers		Total International Travelers
		Intercontinental	Intracontinental	
To purchase interesting gifts and souvenirs	USA (18%) Mexico (8%) Spain (5%)	Mexico (5%) Spain (3%) USA (3%) U.K. (3%)	Spain (14%) Italy (10%) France (7%) USA (2%)	Spain (12%) Italy (9%) France (6%) USA (5%)
To participate in warm-weather sports or lie in the sunshine	Spain (28%) USA (15%) Italy (12%)	Spain (24%) Italy (14%) Greece (8%) USA (1%)	Spain (31%) Italy (19%) France (8%) USA (*)	Spain (30%) Italy (18%) France (7%) USA (4%)
To participate in winter sports and activities	Switzeland (42%) Austria (33%) Italy (4%) USA (3%)	Switzerland (45%) Austria (33%) France (9%) USA (1%)	Switzerland (40%) Austria (39%) Italy (5%) USA (*)	Switzerland (40%) Austria (38%) Italy (5%) USA (1%)
To experience a relaxing atmosphere	USA(15%) Austria (12%) Switzerland (8%)	Austria (17%) Switzerland (11%) France (9%) USA (3%)	Austria (18%) France (9%) Switzerland (8%) USA (1%)	Austria (17%) France (9%) Switzerland (8%) USA (3%)
To participate in outdoor activities like hiking and camping	Austria (25%) USA (9%) Switzerland (8%)	Austria (26%) Switzerland (10%) France (3%) Greece (3%) U.K. (3%) USA (1%)	Austria (33%) Switzerland (9%) France (5%) USA (*)	Austria (31%) Switzerland (9%) France (5%) USA (2%)

*Less than 0.5 percent.

Table 9. Preferences for the United States / Other Countries as International Travel Destinations

	Have Visited Country Previously				Have Not Visited Country Previously			
		Non-USA Travelers				Non-USA Travelers		
	Travelers to the USA	Inter-continental	Intra-continental	Total International	Travelers to the USA	Inter-continental	Intra-continental	Total International
(Base)	(406)	(93)	(1,999)	(2,498)	(377)	(93)	(1,993)	(2,463)
Would Like to Revisit					Would Like to Visit			
United States	61%	7%	1%	2%	Greece	9%	2%	8%	8%
France	4	4	18	17	Japan	6	1	3	3
Canada	4	13	1	1	India	6	7	3	3
Austria	3	3	11	10	Brazil	6	4	3	3
Mexico	3	3	—	—	Chinese Peoples Republic	6	3	2	2
Spain	2	1	13	12	Mexico	4	9	3	3
Greece	2	1	6	6	Australia	4	3	2	2
Italy	2	1	10	9	Canada	3	3	4	4
United Kingdom	2	*	5	5	Sweden	3	1	3	3
Yugoslavia	1	*	5	5	Thailand	3	3	2	2
Switzerland	1	1	4	4	Spain	2	*	3	3
					UAR	2	2	2	2
					Israel	2	1	2	2
					United States	(1)	15	17	17

[1] Not applicable.
*Less than 0.5 percent.

Table 10. German Attitudes (Psychographics) Toward Travel

(In pereent of travelers that agree)

Attitudinal Statement	Travelers to the USA	Non-USA Travelers		Total International Travelers
		Inter-eontinental	Intra-eontinental	
(Base)	(406)	(93)	(2,012)	(2,512)
One of the best parts of a vacation is telling your friends about it when you get home	55%	46%	46%	46%
When I travel abroad I prefer to be on a guided tour	19	25	23	23
The nicest vacation is one where I ean just relax and do nothing	40	37	51	51
When I go on vacation I look for adventure and an opportunity to escape from the ordinary	72	77	68	68
The best vaeations are those that have a lot of night life	24	22	26	26
It is important that I stay at the best plaees when on vaeation	31	30	26	26
I prefer to visit a new country on each trip I take	67	75	58	59
One of the best parts of a trip is planning the whole trip out in advance	59	58	54	55
I prefer to visit countries that have old monuments and other historical buildings	55	52	52	52
I always like to mix with the local people and experience the loeal customs	90	87	82	82
I most like to visit places that my friends have visited before me	24	22	26	26
I'd rather take a longer vaeation trip with fewer luxuries than a shorter, more extravagant one	77	74	78	78
One of the best parts of traveling is to visit new cultures and the new ways of living	92	90	81	81
When I go on a trip I prefer to arrange my own sightseeing schedule and aeeommodations	88	83	86	86
Whenever I travel I spend a lot of time looking for bargain purchases	62	64	62	62
Most of my friends come to me for advice on what foreign eountries to visit	38	39	25	26
I like to visit places where I've been able to learn things that help me in edueation and/or business	56	62	46	47
I try to do too many things when I am on vacation	31	29	22	22

Table 11. Preferred Destination in the USA for a Future Visit/Revisit

	Travelers to the USA	Non-USA Travelers: Inter-continental	Non-USA Travelers: Intra-continental	Total International Travelers
(Base)	(406)	(93)	(1,888)	(2,381)
First Preference [1]				
Far West	46%	38%	33%	33%
South	18	19	23	22
Eastern Gateway	10	7	15	15
Frontier West	7	11	10	10
Mountain West	7	11	4	5
Islands	5	2	5	4
Great Lake Country	4	4	4	4
G. Washington Country	3	5	5	5
New England	2	3	2	2
Total Three Choices [2]				
Far West	81%	74%	73%	73%
South	58	54	63	62
Frontier West	45	41	38	38
Eastern Gateway	32	32	43	43
Mountain West	27	32	20	21
Great Lake Country	20	21	22	22
Islands	17	15	12	12
G. Washington Country	11	15	17	17
New England	6	8	6	6

[1] Percentage may not add to 100% due to rounding.

[2] Multiple responses reflecting summation of first, second, and third destination preferences; percentages add to approximately 300%.

cent), followed by the Far West (40 percent), the South (22 percent), and the Frontier West (21 percent).

The most frequently visited cities or attractions in the United States were: New York City (46 percent); San Francisco (22 percent); Los Angeles (20 percent); Las Vegas (10 percent); Boston and Washington, D.C. (each 8 percent); and the Grand Canyon and San Diego (each with 7 percent).

Table 12 summarizes the travel pattern of German visitors to the United States in 1976. More detailed destination data (including States visited) is now being analyzed and will be presented in a separate U.S. Travel Service report.

In terms of inter-regional travel within the United States, approximately half (48 percent) of the German travelers to this country during 1976 visited only one region during their stays. Twenty-three percent visited two regions; 17 percent visited three regions; and 12 percent visited a total of four or more regions. The median length of stay varied from 3 to 5 days per region.

Bicentennial Influence

A significant proportion (15 percent) of German travelers to the United States during 1976 were influenced by the American Bicentennial in planning their trip to this country. Specific regions in the United States most frequently visited for Bicentennial events or sites included: The Eastern Gateway (60 percent); the Far West (32 percent); George Washington Country (22 percent); New England (17 percent); and the Frontier West (13 percent).

Major Difficulties Encountered on U.S. Trips

Relatively few German travelers to the United States during 1976 encountered major problems/difficulties. Those who did most commonly cited: Expensiveness (mentioned by 30 percent); fear for per-

Table 12. Destinations Visited by German Travelers to the USA in 1976

Destination Visited	German Travelers to the USA	
(Base)	(406)	
New England	11%	
(Boston)		(8)
Eastern Gateway	53	
(New York City)		(46)
(Niagara Falls)		(6)
George Washington Country	16	
(Washington, D.C.)		(8)
(Philadelphia)		(6)
(Baltimore)		(3)
South	22	
(Miami)		(6)
(New Orleans)		(5)
(Atlanta)		(4)
(Disney World/Orlando)		(3)
(Tampa)		(2)
Far West	40	
(San Francisco)		(22)
(Los Angeles)		(20)
(Las Vegas)		(10)
(San Diego)		(7)
(Disneyland)		(5)
(Reno)		(4)
(Seattle)		(4)
Great Lakes Country	18	
(Chicago)		(8)
(Detroit)		(3)
(Cleveland)		(2)
Mountain West	12	
(Yellow Stone Park)		(4)
(Salt Lake City)		(3)
Frontier West	21	
(Grand Canyon)		(7)
(Phoenix)		(4)
(Dallas/Fort Worth)		(3)
(Houston)		(2)
Islands	5	
(Hawaii)		(3)
(Puerto Rico)		(2)
(U.S. Virgin Islands)		(2)

* Multiple destinations/responses; percentages add to over 100%.

sonal safety (14 percent); inadequate information and facilities (12 percent); entry difficulty (11 percent); overcrowding (11 percent); and poor weather (9 percent).

DETAILED TRAVELER/TRIP PROFILES BY U.S. DESTINATIONS

Most German travelers to the United States visited the Eastern Gateway, the Far West, the South, or the Frontier West. Therefore, these regions were analyzed individually. Sample sizes of German travel to the other regions were too small to permit a statistically reliable analysis.

The Eastern Gateway as a Destination

The Eastern Gateway was the destination most frequently visited by German travelers to the United States in 1976. Over half of the Germans who came to the United States visited the Eastern Gateway (53 percent) totaling about 193,000 German visitors. Total expenditures by these visitors to the Eastern Gateway were estimated at $46 million. While German travelers to the Eastern Gateway stayed approximately 21 days in the United States, they remained only about 4 days in this specific region.

Predictably, the majority (87 percent) of the German visitors to the Eastern Gateway visited New York City (46 percent of total German visitors to the United States). Twelve percent of German travelers to the Eastern Gateway visited Niagara Falls.

Approximately one-third (32 percent) of the German travelers who visited the Eastern Gateway during 1976 remained within that region for the duration of their entire stays. A significant proportion (26 percent) visited one additional region; 22 percent visited two additional regions; 12 percent visited three additional regions; and 8 percent visited a total of five or more regions. Other regions visited by German travelers to the Eastern Gateway included: The Far West (29 percent); the South (24 percent); George Washington Country (24 percent); and the Frontier West (17 percent).

Other major cities and attractions around the country also visited by German travelers to the Eastern Gateway were: San Francisco (19 percent); Washington, D.C. (13 percent); Los Angeles and Philadelphia (each 11 percent); Boston (10 percent); Las Vegas (8 percent); and Chicago and Grand Canyon (each 7 percent).

Specific characteristics of German travelers/and trips to the Eastern Gateway in 1976 were:

- 61 percent were males.
- The median age was 32 years.
- 51 percent were married.
- 29 percent of the primary trip decision-makers had a college or university level education, and 30 percent were employed in professional, executive, or managerial type occupations.
- Median household income was $16,850 (somewhat higher than that of the overall German market to the United States).
- 87 percent could speak and/or read English (to some degree).
- Only 7 percent began planning for their trips less than 2 weeks in advance, an additional 12 percent planned their trip 2 to 4 weeks in advance. Two-thirds planned their vacation at least 2 months in advance.
- 54 percent contacted travel agencies in making trip arrangements. 21 percent contacted a transportation carrier directly.
- Over half (60 percent) made their own arrangements for sightseeing, and 43 percent arranged for their own lodging.
- 71 percent used friends and relatives, and 62 percent used travel agencies as sources of information about the United States. Other sources of information frequently used included: Print or visual media (53 percent) and airline companies (36 percent).
- 39 percent purchased charter fares; 29 percent bought regular economy/coach fares; 26 percent bought inclusive-tour packages; 9 percent purchased discount exclusion fares; and only 3 percent paid for first-class fares.
- Most trips were taken in the third (53 percent), second (26 percent), and fourth (12 percent) quarters.
- Median round-trip duration was 24 days.
- Median length of stay in the United States was 21 days.
- Median length of stay in the Eastern Gateway region was 4 days.
- Most German travelers came for vacations (56 percent); 32 percent came to visit relatives; 28 percent came for studies/formal schooling; 18 percent came to visit friends; and 11 percent came for business.
- 27 percent purchased inclusive tours, while 72 percent were independent travelers.
- One-third (34 percent) traveled alone or in the company of one other person (35 percent).
- 26 percent stayed in first class hotels; 53 percent stayed in private homes.
- While in the United States, 46 percent used buses for intra/inter-city transportation; 42 percent used secondary air transportation; 31 percent used taxis, 30 percent used rented cars; 27 percent used personal cars, and 10 percent used rail.
- Total round trip cost (per adult respondent) was $1,185.
- 55 percent used travelers checks.
- Total expenditures (per adult respondent) while in the United States were $555, compared to $540 for the overall U.S. market.
- Money spent in the United States was for: Lodging and food (35 percent); additional transportation (25 percent); gifts and souvenirs (16 percent); miscellaneous (11 percent); and entertainment (13 percent).
- The basic tour price was $600.
- 58 percent of the travelers to the Eastern Gateway chose the United States as the country which they would most like to visit again.
- U.S. regions preferred for revisits (as first choices were: The Far West (47 percent); the South (15 percent); the Eastern Gateway (13 percent); and the Frontier West (7 percent).
- Problems encountered on trips to the United States included: Expensiveness (33 percent); fear for safety (21 percent); inadequate information/facilities (13 percent); and entry difficulty (11 percent).

The Far West as a Destination

The Far West was the second most frequently visited destination by German travelers to the United States during 1976. Forty percent or 146,000 Germans visiting this region during their trip to the United States. Total spending by the travelers in the Far West was an estimated $62 million. The median number of days spent in the Far West was 4. The median length of stay in the United States by travelers to this region was 28 days, compared to a 25-day average for the overall market as a whole.

A number of cities and attractions were visited by German travelers to the Far West, chiefly in California and Nevada. Nearly half of the travelers to this region either visited San Francisco (60 percent) and/or Los Angeles (53 percent). Las Vegas (26 percent), San Diego (19 percent), and Disney-

land (14 percent) were also visited by substantial numbers of German travelers to the Far West.

Approximately 30 percent of the 1976 German travelers to the Far West remained in that region for the duration of their trips. Nearly a quarter (24 percent) visited one additional region; 22 percent visited two additional regions; and 15 percent visited four regions. Other regions of the country frequently visited by German travelers to the Far West included: The Eastern Gateway (38 percent); The Frontier West (36 percent); and The South (19 percent). Other major attractions around the country also visited by these German travelers included: San Francisco (60 percent); Los Angeles (53 percent); New York City (36 percent); Las Vegas (26 percent); Disneyland (14 percent); Chicago and Phoenix (each 9 percent); and Boston and Washington, D.C. (each 5 percent).

German travelers/trips to the Far West region generally had the following set of characteristics:

- 68 percent were males.
- The median age was 33 years.
- 44 percent were married.
- 30 percent (referring to the trip-decision maker) had college or university level educations.
- 31 percent (referring to the trip-decision maker) were employed in professional/executive/managerial occupations.
- Median household income was $14,490 (considerably lower than the overall market figure of $15,560).
- 88 percent could speak and/or read English (to some degree).
- Only 10 percent began their trip planning less than 2 weeks in advance, 11 percent planned their trips 2 to 4 weeks in advance. Two-thirds planned their trips at least 2 months in advance.
- 56 percent contacted travel agencies for trip arrangements and bookings.
- 20 percent contacted transportation carrier directly.
- 71 percent used friends and relatives and 58 percent used travel agents to get information about the United States. Other information sources frequently used were: print and visual media (57 percent); and airline companies (35 percent).
- 40 percent purchased charter fares; 30 percent bought regular economy/coach fares; 17 percent purchased discount excursion fares; and 17 percent bought inclusive tour packages.
- Most trips were taken in the third (50 percent); second (28 percent); and first quarters (11 percent).
- Median round-trip duration was 30 days.
- Median length of stay in the United States was 28 days.
- Median length of stay in the Far West was 4 days.
- Over two-thirds (67 percent) came on vacation trips; 30 percent came to visit relatives; 24 percent came for formal schooling; an additional 24 percent came to visit friends; and 11 percent were on business trips.
- 19 percent came on inclusive tours; 81 percent were independent travelers.
- The majority traveled alone (33 percent) or with one other person (38 percent).
- 33 percent stayed in first class hotels, and 56 percent stayed in private homes.
- Over half (53 percent) used secondary air transportation; 44 percent used buses; 41 percent used rented cars; 29 percent used personal cars; and 19 percent used taxis.
- Total trip costs (per adult respondent) amounted to $1,480, compared to $1,220 for the entire U.S. market.
- Total expenditures of travelers to Far West while in the United States were $725, compared to $540 for the overall market.
- The basic tour price (for those who took tours to the Far West) was $990, compared to the overall average of $700.
- 62 percent used travelers checks.
- 39 percent of expenditures in the United States were for lodging and food; 28 percent for additional transportation; 12 percent for gifts and souvenirs; and 11 percent for entertainment.
- 65 percent of the visitors to the Far West chose the United States as the country they would most like to visit again.
- Regions preferred for revisit to the United States were (as first choices): The Far West (57 percent); the South (11 percent); and the Frontier West and the Eastern Gateway (each 7 percent).
- Problems/difficulties encountered in the United States included: Expensiveness (32 percent); inadequate information/facilities (14 percent); overcrowding and fear for personal safety (12 percent each).

The South as a Destination

The South was the third most frequently visited

destination of U.S.-bound German travelers in 1976. Twenty-two percent or about 81,000 Germans visited this region in their trip to the United States. Total expenditures by these travelers to the South in 1976 were an estimated $19 million. These German visitors generally stayed about 3 days in the South. The median length of stay for their entire trip in the United States was about 28 days.

Several cities were visited by travelers to the South, chiefly in Louisiana and Florida. Twenty-five percent of the German travelers to the South visited Miami (6 percent of all German travelers to this country). Miami was followed in popularity by New Orleans, which was visited by 23 percent of the German travelers to the South (5 percent of the total U.S.-bound German travel market). Other cities/sites in the South to receive substantial numbers of German travelers included Disneyworld/Orlando (14 percent); Tampa (10 percent); and Nashville (7 percent).

German travelers to the South also frequently visited other regions and cities throughout the United States. In fact, only about a quarter (24 percent) confined their travels to the South for the duration of their stays in this country. Eighteen percent visited one additional region; 25 percent visited two additional regions; 18 percent traveled to four regions; and 15 percent visited five or more regions.

Other regions visited as part of the trip itinerary of travelers to the South were the Eastern Gateway (57 percent); the Far West (33 percent); the Frontier West (25 percent); and George Washingington Country (27 percent). Other major cities/attractions around the country also visited by German travelers to the South included: New York City (51 percent); San Francisco (20 percent); Los Angeles (18 percent), Washington, D.C., and Philadelphia (each with 9 percent); Grand Canyon (7 percent); and Las Vegas and Phoenix (each 6 percent).

Specific characteristics of German travelers to the South included:

- 63 percent were male.
- The median age was 30 years.
- 50 percent were married.
- 33 percent of the primary trip decision makers had college or university level educations.
- 29 percent referring to the trip decision makers were engaged in professional/executive/managerial occupations.
- Median household income was $16,060, compared to $15,545 for the overall market.
- 84 percent could speak or read English to some degree.
- Only 7 percent began planning their trips less than 2 weeks in advance; an additional 13 percent planned their trip 2 to 4 weeks prior to departure.
- 63 percent contacted travel agencies in booking their trips.
- 17 percent contacted transportation carriers directly.
- 69 percent used friends/relatives, and two thirds (66 percent) used travel agents to gain information about the United States. Other frequently used sources of information included: Print/visual media (48 percent) and airline companies (34 percent).
- 32 percent booked charter passage; 43 percent bought regular economy coach fares; 13 percent purchased tour packakges; 8 percent purchased discount excursion fares; and only 7 percent bought first class fares.
- Most trips were taken in the third (43 percent), second (22 percent), and first quarters (17 percent).
- Median round-trip duration was 35 days.
- Median length of stay in the United States was 28 days.
- Median length of stay in the South was 3 days.
- 62 percent of the German travelers to the South came for vacations; 40 percent came to visit relatives; 27 percent came to visit friends; 22 percent came for studies/formal schooling; and 16 percent came for business reasons.
- 14 percent visited the South in inclusive tours, and 86 percent were independent travelers.
- 27 percent traveled alone, and an additional 30 percent were accompanied by one other person.
- 33 percent stayed in first class hotels; and 58 percent stayed in private homes during all or part of their visit.
- While in the United States, 55 percent used secondary air transportation; 45 percent used personal cars; 35 percent used buses; and 24 percent used taxis
- Total round trip costs per adult respondent amounted to $1,350, compared to $1,220 for the overall market.
- Total expenditures while in the United States were $660.

- The basic tour price was $870.
- 63 percent used travelers checks.
- Per capita spending in the United States was for: Food and lodging (40 percent); additional transportation (29 percent); gifts and souvenirs (13 percent); and entertainment (10 percent).
- 59 percent chose the United States as the country which they would most like to revisit.
- Regions preferred to revisit in the United States (as first choices) were: The Far West (41 percent); the South (25 percent); and the Eastern Gateway (8 percent).
- Difficulties encountered included expensiveness (33 percent); entry difficulty (20 percent); overcrowding (18 percent); and inadequate information or facilities (13 percent).

The Frontier West as a Destination

The Frontier West was the fourth most frequently visited region by German travelers to the United States during 1976. Twenty-one percent, or approximately 78,000 Germans visited this region in 1976, spending an estimated $17 million there. They stayed for a median of 3 days in this region, and their median length of stay in the United States was about 30 days.

The Grand Canyon was the most frequently visited destination by German travelers (34 percent) to the Frontier West. It received 7 percent of the total U.S.-bound German traveler market during 1976. Phoenix, Dallas/Fort Worth, and Houston were the most frequently visited cities in this region (by 18 percent, 15 percent, and 12 percent, respectively).

Ten percent of the German travelers to the Frontier West visited only this region during their 1976 visit to the United States. Approximately 24 percent visited at least one other region; 36 percent visited two additional regions; 15 percent visited three additional regions; and 15 percent visited a total of five or more regions.

Other regions of the United States frequently visited by German travelers to the Frontier West included: The Far West (67 percent); the Eastern Gateway (41 percent); and the South (26 percent). Major cities/attractions around the United States also visited by German travelers to the Frontier West were: San Francisco (45 percent), Los Angeles (40 percent), New York City (37 percent), Grand Canyon (35 percent), Las Vegas (28 percent), Phoenix (8 percent), New Orleans and Dallas/Ft. Worth (each 6 percent).

Specific characteristics of German travelers/trips to the Frontier West during 1976 included:

- 69 percent were males.
- The median age was 32 years.
- 46 percent were married.
- 33 percent of the trip decision makers had college or university level educations and nearly one-third were employed in professional/executive/managerial occuptions.
- Median household income was $16,320.
- 94 percent could either speak or read English to some degree.
- Approximately 13 percent planned their trips less than 2 weeks in advance, and an additional 9 percent planned their trips some 2 weeks to less than 1 month in advance. Some 62 percent planned their trips at least 2 months in advance.
- Over half (58 percent) contacted travel agency in making arrangements for their trip.
- 20 percent contacted transportation carriers directly.
- Nearly three quarters (72 percent) used friends and relatives as sources of information about the United States. Additional information sources about this country included travel agents (used by 61 percent of the German travelers to this region) and print/visual media (59 percent).
- 47 percent of German travelers to the United States booked charter passage and 31 percent booked regular economy/coach fares, followed by 13 percent who bought inclusive tour packages, and 7 percent who purchased discount excursion fares.
- The majority of trips were taken during the third (55 percent), second (23 percent), and first quarters (11 percent).
- Median round trip duration was 32 days.
- Median length of stay in the United States was 30 days.
- Median length of stay in the Frontier West was 3 days.
- 67 percent of German travelers to the Frontier West came for vacations; 24 percent came to visit relatives; 21 percent came for studies or formal schooling; 18 percent came to see friends; and 15 percent came for business reasons.
- 14 percent visited The Frontier West on inclusive tours, and 86 percent were independent travelers.

- 37 percent traveled alone, and an additional 29 percent were accompanied by one other person.
- 36 percent stayed in first class hotels, and 54 percent stayed in private homes during all or part of their visit.
- While in the United States, 62 percent used secondary air transportation; 50 percent rented cars, 38 percent used buses (for intra/inter-city travel); 34 percent used personal cars (of friends or relatives); and 19 percent used taxis.
- Total round trip cost (per adult) respondent was $1,560, compared to $1,220 for the overall market.
- 66 percent used travelers checks.
- Total trip expenditures per adult respondent while in the United States amounted to $805—well above the overall average price ($540).
- The basic tour price for travelers to the Frontier West was $990 compared to $700 for the overall market.
- Allocation of spending in the United States was: Food and lodging (42 percent); additional transportation (27 percent); gifts and souvenirs (10 percent); and entertainment expenses (10 percent).
- 70 percent chose the United States as the country which they would most like to revisit.
- Regions preferred to revisit in the United States (as first choices) were: The Far West (54 percent); the South (16 percent); the Frontier West (13 percent) and the Eastern Gateway (6 percent).
- Problems encountered in the United States included: expensiveness (mentioned by 20 percent of German travelers to the Frontier West); fear for personal safety (14 percent); overcrowding (10 percent); inadequate information/facilities and entry difficulty (each 9 percent).

Detailed tabular data concerning German travel by U.S. regional destination and other segmentations are presented in Appendix A.

IV. APPENDICES

APPENDIX A: Summary Tables

Characteristics of Travelers/Trips to the United States By Selected Market Segments—Germany

Traveler/Trip Characteristics	Total Travelers To U.S.	U.S. Destinations				Purpose of Trip			Planning Organization		
		Eastern Gateway	Far West	South	Frontier West	Vacation Travelers	Business Travelers	VFR Travelers	Travel Agency	Transport Carrier	Inclusive Tour Travelers
(Base)	(406)	(213)	(162)	(91)	(87)	(229)	(51)	(189)	(206)	(88)	(93)
Sex [1]											
Male	61%	61%	68%	63%	69%	57%	95%	52%	56%	58%	62%
Female	39	38	32	37	31	43	5	48	44	42	38
Age [1]											
Median	32	32	33	30	32	31	42	35	35	35	31
Marital Status [2]											
Married	50%	51%	44%	50%	46%	48%	80%	45%	49%	49%	47%
Single	50	49	56	50	54	52	20	55	51	51	53
Education [3]											
Grammar school	23%	20%	21%	26%	12%	23%	2%	34%	24%	31%	23%
Junior high school	18	18	14	8	15	20	14	18	17	19	22
High school/Junior college	23	24	28	25	32	26	12	24	26	22	27
Technical/Vocational	9	8	7	8	8	7	20	7	9	9	4
College/University	27	29	30	33	33	24	53	16	25	19	25
Occupation [3]											
Professional	6%	7%	6%	7%	6%	4%	10%	5%	7%	7%	7%
Executive/government	23	23	25	22	28	21	53	13	19	16	18
Clerical	21	20	17	19	18	22	16	25	19	25	17
Student	13	14	20	21	23	17	2	14	17	9	16
Sales/merchant	10	14	8	11	9	10	10	10	11	13	12
Self-employed	8	7	7	7	9	9	10	6	10	11	12
Retired/unemployed	7	4	7	7	2	5	—	12	7	10	4
Other	11	12	9	8	3	13	—	16	11	9	14

See footnotes at end of tables.

Characteristics of Travelers/Trips to the United States By Selected Market Segments—Germany

Traveler/Trip Characteristics	Total Travelers To U.S.	U.S. Destinations				Purpose of Trip			Planning Organization		
		Eastern Gateway	Far West	South	Frontier West	Vacation Travelers	Business Travelers	VFR Travelers	Travel Agency	Transport Carrier	Inclusive Tour Travelers
(Base)	(406)	(213)	(162)	(91)	(87)	(229)	(51)	(189)	(206)	(88)	(93)
Annual Household Income [2]											
$4,662 or less	7%	6%	11%	14%	9%	9%	—	11%	10%	7%	2%
$4,663 to $9,325	14	12	15	10	11	12	6	21	13	15	16
$9,326 to $13,989	21	19	23	17	19	23	2	27	22	26	17
$13,990 to $18,652	22	21	19	21	23	21	27	17	22	21	26
$18,652 to $23,315	12	13	11	14	10	12	19	10	10	13	16
$23,316 to $32,641	11	14	8	8	13	11	29	7	9	9	10
$32,642 or more	12	15	14	15	16	13	17	9	14	8	13
Median Household Income	$15,560	$16,850	$14,490	$16,060	$16,320	$15,440	$22,280	$12,630	$14,965	$13,910	$16,625
Size of Household [2]											
Median number of persons	2.2	2.3	1.9	2.2	2.2	2.1	2.3	2.9	2.2	1.9	3.0
Average number of persons (mean)	3.0	3.1	2.7	3.1	3.0	2.9	2.9	3.4	3.0	2.7	3.6
Children in Household [2]											
Average no. of children	0.7	0.8	0.5	0.8	0.6	0.6	0.1	0.5	0.7	0.4	0.8
Adults only (percent)	62%	61%	68%	57%	63%	64%	42%	71%	63%	71%	51%
Language Capability [2]											
Speak or read English	84	87	88	84	94	84	96	76	83	85	84
Prior Planning Time											
Less than 2 weeks	9%	7%	10%	7%	13%	6%	33%	5%	7%	12%	9%
2 weeks to less than 1 month	11	12	11	13	9	7	24	10	10	21	7
1 month to less than 2 months	15	15	15	18	13	14	16	14	14	22	15
2 months to less than 4 months	33	33	30	35	27	38	14	38	37	28	42
4 months to 6 months	17	16	17	14	19	19	4	15	18	10	20
6 months or more	15	17	17	13	16	16	10	18	15	8	8

See footnotes at end of tables.

Characteristics of Travelers/Trips to the United States By Selected Market Segments—Germany

Traveler/Trip Characteristics	Total Travelers To U.S.	U.S. Destinations				Purpose of Trip			Planning Organization		
		Eastern Gateway	Far West	South	Frontier West	Vacation Travelers	Business Travelers	VFR Travelers	Travel Agency	Transport Carrier	Inclusive Tour Travelers
(Base)	(406)	(213)	(162)	(91)	(87)	(229)	(51)	(189)	(206)	(88)	(93)
Planning Organization Contacted [a]											
Travel agency	52%	54%	56%	63%	58%	60%	48%	55%	100%	—	40%
Transportation carrier	24	21	20	17	20	18	20	32	4	100	15
Other	31	31	33	24	30	31	36	19	5	8	54
Sources of Information about the United States [a]											
Friends/relatives	68%	71%	72%	69%	72%	72%	39%	80%	71%	65%	57%
Travel agencies	57	62	58	66	61	62	49	55	77	33	61
Articles in print/visual media	50	53	57	48	59	54	45	44	47	48	55
Airline company offices	36	36	35	34	37	32	43	38	27	76	26
Paid advertising	22	23	22	17	19	26	16	18	21	23	27
USTS	19	21	23	21	24	20	6	15	17	23	24
Embassies	11	9	14	14	16	11	12	8	9	15	14
Type of Fare Purchased [a]											
First class	4%	3%	4%	7%	6%	4%	10%	3%	5%	5%	1%
Regular economy/coach	34	29	30	43	31	26	82	41	32	60	4
Discount excursion	13	9	17	8	7	14	2	16	13	16	8
Charter	34	39	40	32	47	42	4	38	40	13	14
Tour package	22	26	17	13	13	22	4	7	18	13	95
Seasonality											
First quarter	12%	9%	11%	17%	11%	11%	16%	11%	12%	13%	21%
Second quarter	28	26	28	28	23	24	25	32	26	42	22
Third quarter	47	53	50	43	55	57	37	49	50	29	40
Fourth quarter	13	12	10	13	10	9	22	8	13	9	18

See footnotes at end of tables.

Characteristics of Travelers/Trips to the United States By Selected Market Segments—Germany

Traveler/Trip Characteristics	Total Travelers To U.S.	U.S. Destinations: Eastern Gateway	Far West	South	Frontier West	Purpose of Trip: Vacation Travelers	Business Travelers	VFR Travelers	Planning Organization: Travel Agency	Transport Carrier	Inclusive Tour Travelers
(Base)	(406)	(213)	(162)	(91)	(87)	(229)	(51)	(189)	(206)	(88)	(93)
Length of Round Trip											
Median number of days	28	24	30	35	32	28	14	29	28	28	21
Length of Stay in U.S.											
Median number of days	25	21	28	28	30	28	13	28	25	26	20
Purpose of Trip [a]											
Vacation	57%	56%	67%	62%	67%				65%	39%	55%
Visit relatives	34	32	30	40	24				35	49	10
Visit friends	20	18	24	27	18				21	23	5
Business	13	11	11	16	15				12	11	3
Attend convention	2	3	1	1	2				3	2	2
Study/formal schooling	24	28	24	22	21				19	16	53
Other	5	5	4	2	3				5	3	9
Inclusive Tour Travel											
Yes	23%	27%	19%	14%	14%	22%	6%	7%	18%	13%	100%
No	77	73	82	86	86	78	94	93	83	88	—
Size of Traveling Party											
1 Person	37%	34%	33%	37%	37%	28%	49%	45%	38%	51%	36%
2 Persons	32	35	38	30	29	37	29	36	34	33	21
3 or more persons	30	31	29	33	34	35	22	19	29	16	43

See footnotes at end of tables.

Characteristics of Travelers/Trips to the United States By Selected Market Segments—Germany

Traveler/Trip Characteristics	Total Travelers To U.S.	U.S. Destinations				Purpose of Trip			Planning Organization		
		Eastern Gateway	Far West	South	Frontier West	Vacation Travelers	Business Travelers	VFR Travelers	Travel Agency	Transport Carrier	Inclusive Tour Travelers
(Base)	(406)	(213)	(162)	(91)	(87)	(229)	(51)	(189)	(206)	(88)	(93)
Activities Engaged In [a]											
Met interesting new people	87%	88%	84%	90%	84%	83%	92%	86%	85%	89%	83%
Saw beautiful scenery	85	80	93	82	92	86	67	88	87	82	79
Experienced a new culture/ way of life	84	85	83	78	93	91	57	84	82	84	88
Visited places of significant historical interest	69	73	65	63	70	70	43	71	68	67	71
Learned new things helpful in one's business/social life ..	61	64	64	55	88	60	65	61	62	58	60
Bought interesting gifts and souvenirs	56	51	52	63	47	57	39	62	56	59	58
Enjoyed an exciting night life/ good restaurants/entertainment	55	59	55	54	55	57	45	56	54	47	63
Participated in warm weather sports/lay in the sunshine ...	52	42	58	62	62	66	12	59	53	56	50
Experienced a bargain priced vacation	52	53	44	47	47	54	14	65	53	53	52
Went camping	13	12	16	15	20	18	—	13	17	9	12
Went snow skiing	2	1	5	4	7	3	—	2	2	2	3
Participated in winter sports/ activities	2	1	4	1	5	2	—	1	1	2	2

See footnotes at end of tables.

Characteristics of Travelers/Trips to the United States By Selected Market Segments—Germany

Traveler/Trip Characteristics	Total Travelers To U.S.	U.S. Destinations				Purpose of Trip			Planning Organization		
		Eastern Gateway	Far West	South	Frontier West	Vacation Travelers	Business Travelers	VFR Travelers	Travel Agency	Transport Carrier	Inclusive Tour Travelers
(Base)	(406)	(213)	(162)	(91)	(87)	(229)	(51)	(189)	(206)	(88)	(93)
Lodging Used [a]											
First class hotel	24%	26%	33%	33%	36%	26%	55%	13%	28%	15%	32%
Other hotel/motel	48	53	67	52	83	59	61	45	53	27	52
Private home	58	53	56	58	54	59	14	87	58	73	34
Other	22	26	33	33	43	30	4	17	28	10	21
Secondary Transportation Used in the United States[a]											
Air	42%	42%	53%	55%	62%	43%	57%	39%	45%	30%	50%
Boat	6	6	4	2	5	8	—	3	6	4	14
Rail	7	10	5	4	5	7	6	9	6	11	6
Personal car	33	27	29	45	34	31	28	50	33	41	21
Bus/tour bus	39	46	44	35	38	40	18	31	33	34	70
Taxi	24	31	19	24	19	23	43	15	22	22	31
Rental car	28	30	41	23	50	33	43	25	29	23	9
Other	10	10	12	12	15	12	6	9	11	6	4
Total Trip Expenditures [2] Average (per adult respondent)	$1,220	$1,185	$1,480	$1,355	$1,560	$1,240	$1,765	$1,105	$1,280	$1,140	$1,055
Total Expenditures in the United States [2] Average (per adult respondent	$ 540	$ 555	$ 725	$ 660	$ 805	$ 585	$ 810	$ 505	$ 625	$ 450	$ 335

See footnotes at end of tables.

Characteristics of Travelers/Trips to the United States By Selected Market Segments—Germany

Traveler/Trip Characteristics	Total Travelers To U.S.	U.S. Destinations				Purpose of Trip			Planning Organization		Inclusive Tour Travelers
		Eastern Gateway	Far West	South	Frontier West	Vacation Travelers	Business Travelers	VFR Travelers	Travel Agency	Transport Carrier	
(Base)	(406)	(213)	(162)	(91)	(87)	(229)	(51)	(189)	(206)	(88)	(93)
Allocation of Expenditures in the United States [2]											
Secondary transportation	24%	25%	28%	29%	27%	26%	23%	27%	25%	25%	15%
Lodging and food	35	35	39	40	42	36	50	28	37	29	20
Gifts/souvenirs and other purchases	17	16	12	13	10	16	11	20	14	23	29
Entertainment	13	13	11	10	10	13	8	14	12	12	21
Miscellaneous (sightseeing, tips etc.)	11	11	10	9	10	10	8	12	11	11	15
U.S. Destinations Visited[a]											
New England	11%	13%	7%	6%	6%	9%	14%	14%	12%	16%	9%
Eastern Gateway	53	100	38	57	41	52	47	49	54	48	62
George Washington Country	16	24	7	22	6	15	10	18	14	11	17
The South	22	24	19	100	26	24	28	27	27	16	14
Great Lakes Country	18	16	15	24	21	16	20	21	18	18	11
Mountain West	12	14	25	14	30	16	6	11	16	3	8
Frontier West	21	17	36	25	100	25	26	17	24	17	13
Far West	40	29	100	33	67	47	35	38	43	31	32
U.S. Islands	5	3	7	2	5	7	2	3	6	5	12

[a] Includes multiple responses; percentages may add to more than 100%.
[b] Reflects data concerning only those travelers who purchased commercial transportation to the USA.
[1] Reflects data concerning all travel party members.
[2] Reflects data concerning the respondent only.
[3] Reflects data concerning the primary decision-maker for the trip.
*Less than ½ of 1%.

APPENDIX B

DEFINITIONS AND USE OF TERMS

The focus of analysis in this study was on segmenting the international travel market into traveler groups by both the distance of their chosen destination and discernable traveler segments. The following terms were used repeatedly in this study to distinguish potential market groups:

Domestic Travelers

These are travelers who did not leave their country-of-residence in 1976 but who did take a domestic trip for business or pleasure which was more than 200 kilometers away from home and longer than 48 hours. Domestic travelers were surveyed only in Mexico. The trip surveyed was the longest domestic trip.

International Travelers

These are travelers who took one or more trips for business or pleasure outside of their country-of-residence in 1976. These international travelers represent the total population surveyed in the United Kingdom, France, Germany, Japan and the majority of the surveyed population in Mexico.

The international traveler population was further stratified into the following major categories:

Total USA Travelers

These are travelers who took one or more trips for business or pleasure to the USA in 1976. This group is further stratified as follows:

USA-only travelers: persons who visited only the USA during their trip.

USA-plus travelers: persons who visited other countries in conjunction with the USA during their trip.

Total Non-USA Travelers

These are travelers who took one or more trips outside of their country-of-residence in 1976 for business or pleasure but did not visit the USA. This group is further stratified as follows:

Non-USA intercontinental travelers: persons who took one or more trips outside of their country-of-residence for either business or pleasure during 1976 and whose longest trip took them outside of their continental perimeters as defined to be consistent with previous studies (see page 47), but not to the USA.

Non-USA intracontinental travelers: persons who took one or more trips outside of their country-of-residence for either business or pleasure during the 1976 calendar year but whose longest trip did not take them outside their continental perimeters and who did not travel to the USA.

It should be noted that the surveyed trip was the most recent U.S. trip in 1976 for travelers to the U.S. and the trip of the longest duration for non-USA travelers and Mexican Domestic travelers. The longest trip was surveyed for non-USA travelers in order to increase the data base on intercontinental travelers as much as possible since they represent the market segment having the highest potential for future travel to the USA.

In addition, the following travel related terms are used in the study:

Inclusive Tour Travelers

Classification as an inclusive tour traveler was based on the response given to Question D2 of each questionnaire, i.e., "Did your trip involve a tour package that included such things as lodging, ground transportation, meals, or sight-seeing, in addition to basic transportation?" Only those who answered "yes" were considered to be inclusive tour travelers.

Travel Agency Users

These are travelers who indicated they had contacted a travel agency in planning/organizing their trip.

Transportation Carrier Users

These are travelers who indicated they had contacted a transportation carrier/company directly in planning/organizing their trip.

Youth Travelers

These were travelers who were between 18 and 30 years of age.

Middle Age Travelers

These were travelers who were between 31 and 60 years of age.

Senior Citizen Travelers

These were travelers who were over 60 years of age.

World Tourism Areas

The 98 countries most frequently mentioned throughout the survey have been grouped into major world tourism areas. Appendix C contains this list of areas and the countries within each of them.

Regions of Origin

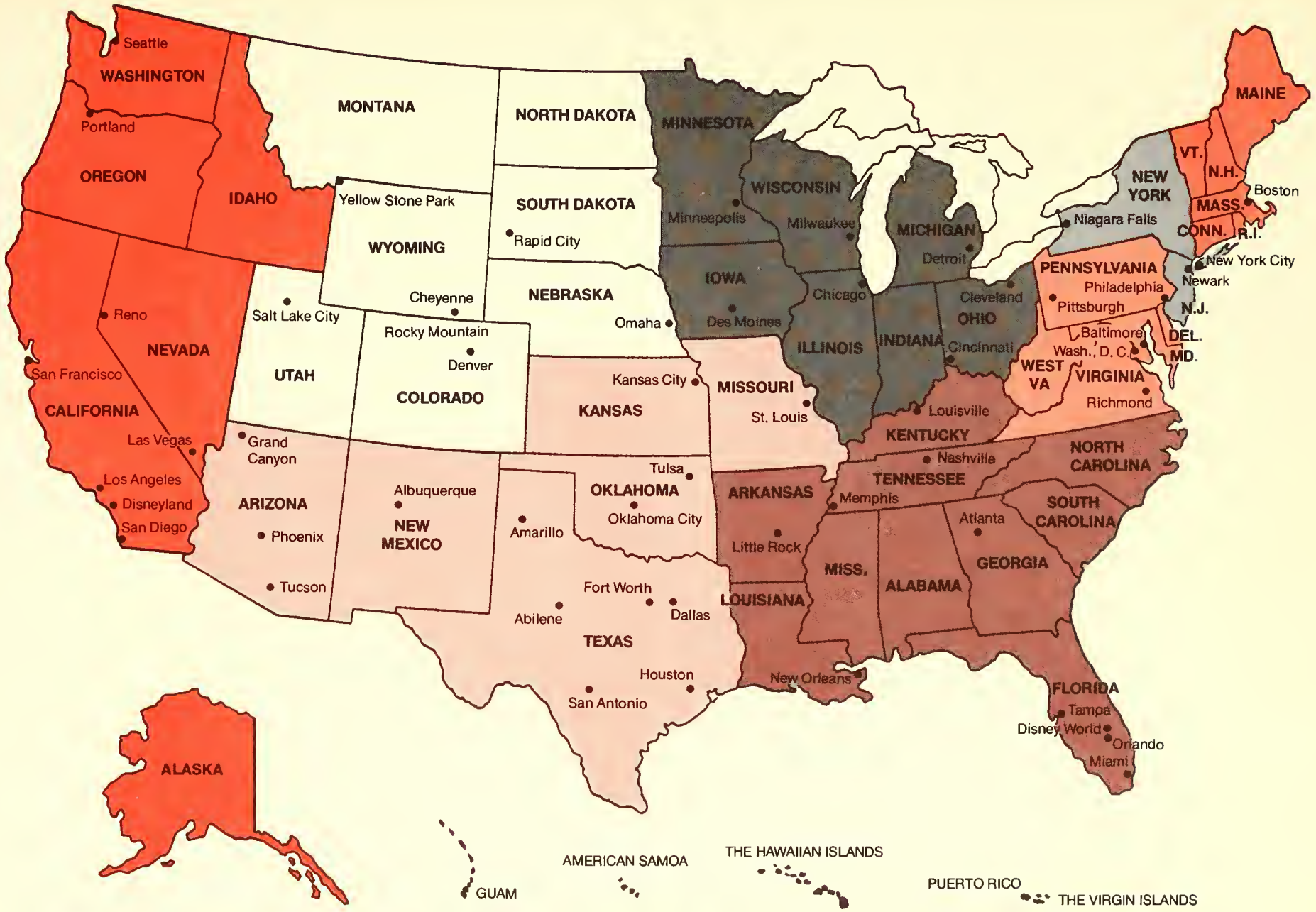
Travelers who visited the USA were grouped and analyzed in accordance with their region of origin. A list of the regions for each of the five countries sampled can be found on page 41.

USA Regions of Destination

The USA cities and states (this list appears in Question A5 of the USA traveler questionnaire) mentioned as USA visitor destinations were grouped into nine tourism regions: New England, Eastern Gateway, George Washington Country, South, Great Lakes Country, Mountain West, Far West, the Frontier West, and the U.S. Islands.

The U.S. Islands region is formed by grouping Hawaii, Guam, American Samoa, Puerto Rico, and the U.S. Virgin Islands. The following USA map shows these nine tourism regions and the states included in each.

U. S. TOURIST REGIONS



New England
Connecticut
Maine
Massachusetts
New Hampshire
Rhode Island
Vermont

Eastern Gateway
New Jersey
New York

George Washington Country
Delaware
District of Columbia
Maryland
Pennsylvania
Virginia
West Virginia

The South
Alabama
Arkansas
Florida
Georgia
Kentucky
Louisiana
Mississippi
North Carolina
South Carolina
Tennessee

Great Lakes Country
Illinois
Indiana
Iowa
Michigan
Minnesota
Ohio
Wisconsin

Mountain West
Colorado
Montana
Nebraska
North Dakota
South Dakota
Utah
Wyoming

Frontier West
Arizona
Kansas
Missouri
New Mexico
Oklahoma
Texas

Far West
Alaska
California
Idaho
Nevada
Oregon
Washington

The Islands
American Samoa
Guam
Hawaii
Puerto Rico
Virgin Islands

APPENDIX C

TECHNICAL NOTES

Purpose and Scope of the Study

Performed for the United States Travel Service by Hay Associates during late 1976 and early 1977, the overriding objective of this study was to provide data that would be operational to the market planning and strategy of the USTS and other U.S. travel industry organizations. Comprehensive major market surveys were conducted in five separate countries: Mexico, Japan, United Kingdom, West Germany, and France.

This five-country market study is part of the ongoing effort of USTS's Research and Analysis Division to provide the statistical, marketing, and economic data necessary for tourism marketers to promote the United States as a travel destination effectively. In addition, this study expands the scope of past studies by moving beyond research into traditional demographic and socioeconomic variables and into research on the travel motivations, the attitudes, and product perceptions of international travelers.

The major objective of this study was to determine the characteristics of actual and potential travelers to the United States among residents of five major tourist-generating countries: Mexico, Japan, United Kingdom, West Germany, and France. This was accomplished through household interviews with travelers 18 years of age and older who had traveled internationally in 1976.*

Market intelligence was sought on the following:

- characteristics of travelers from the country as a whole
- characteristics of travelers from specific regions-of-residence within the country
- characteristics of travelers who had visited specific regions-of-destination within the United States.
- characteristics of specific market segments within the overall international travel market to the United States.

The following regions-of-residence were studied in detail:

Japan
Kanto
Kansai
Nagoya and environs
Fukuoka and environs
Sapporo and environs
Other

United Kingdom
London
S.E. & East Anglia
S.W.
North
Midlands
Scotland
Wales

West Germany
West Berlin
Southern Region
Rhein-Main Region
Rhein-Ruhr Region
Northern Region

Mexico
Mexico City
Monterray
Guadalajara
Puebla

France
Paris
Banlieue Parisienne
Lyon
Marseille
Strasbourg

The parameters of the USA regions-of-destination analyzed were those of the Discover America tourist regions. These are as follows: New England, Eastern Gateway, George Washington Country, The South, Great Lakes Country, Old West, Frontier West, Far West, Mountain West, and the Islands. For pur-

* In Mexico, the survey also included those domestic travelers who had not traveled outside of Mexico during 1976 but who had taken a trip of 200 kilometers or more which lasted 48 hours or more. Domestic travelers were surveyed in Mexico because of the geographic proximity of this country to the United States. This makes domestic travelers a major potential market segment for future visits to the USA.

poses of the Japanese study, the Islands region was further subdivided to permit a separate analysis of those travelers who visited Guam and Hawaii. (A map and definition of the states included in these U.S. tourist regions can be found on page 39.)

Only those USA regions-of-destination with a sufficient number of visitors to permit valid statistical interpretation were analyzed. The objective of both this region-of-residence and region-of-destination analysis was to provide in-depth market data on the characteristics that distinguish regional consumers from the total international travel market in each country. This market intelligence has operational value to tourism marketers in decisions regarding both media and message content selection, distribution strategy, and other promotional efforts because it analyzes both market origin characteristics and product consumption characteristics.

An additional focus of the study was on segmenting the market by their world geographic destination choices. The basis for this focus is the hypothesis that geographic distance (due to both cost and psychological factors) is a major determinant in travel decisions. Therefore, the intercontinental (long-haul) traveler represents the market segment with the highest potential for future USA travel in its overseas markets.

Sample Design

1. *Purpose.* The sample was designed to serve two purposes within the constraints of limited time and funds. One purpose was to obtain a representative set of respondents from several parts of each country sampled, and the second was to obtain at least 400 interviews with travelers who had visited the USA in 1976.

A qualified respondent was one who was 18 years of age or over, had traveled internationally in 1976, and had been involved in making the decisions about the trip. In Mexico, a respondent qualified if he or she had traveled domestically on at least one trip of 200 kilometers or more that lasted 48 hours or more.

2. *Quotas and Weighting.* For each country and for each class of traveler, the minimum quotas were:

	Country				
Traveler Class	U.K.	Fr.	W. Ger.	Japan	Mex.
Total	2401	2401	2401	2401	2401
USA Visitors	400	400	400	850	950
Non-USA Visitors	2001	2001	2001	1551	901
Domestic	—	—	—	—	550

Target sample required an average of 2500 interviews per country. The final number of usable interviews were:

	Country				
Traveler Class	U.K.	Fr.	W. Ger.	Japan	Mex.
Total	2615	2447	2512	2533	2496
USA Visitors	421	407	406	1096	954
Non-USA Visitors	2194	2040	2106	1437	968
Domestic	—	—	—	—	574

Thus the total number was 12,603, or slightly above the 12,500 hoped for.

Most of the tables and analyses refer to "Total International Travelers" and it was necessary to combine the non-USA travelers with the USA visitors by weighting for this total, rather than simply adding the two sub-samples together. This was required because each of those sub-samples had its own quota, and thus was not representative of the actual ratio between these two kinds of respondents in the sampled country. USTS supplied the figures showing the historical proportions, and these were used in weighting the two sub-samples to produce the "total" column. These proportions were:

United Kingdom:	.05 for USA travelers .95 for non-USA travelers
France:	.03 for USA travelers .97 for non-USA travelers
Germany:	.03 for USA travelers .97 for non-USA travelers
Mexico:	.86 for USA travelers .14 for non-USA travelers
Japan:	.27 for USA travelers .73 for non-USA travelers

These proportions were used as weights to produce a set of weighted frequencies by applying them to the non-USA frequencies, and the USA frequencies for each table that contains the three columns of percents: Total International, Total USA, and Total Non-USA. The formulas used were:

$$W_i = K(\beta_n X_i + \beta\mu Y_i)$$

and

$$K = \frac{\sum_i X_i + \sum_i Y_i}{\beta_n \sum_i X_i + \beta\mu \sum_i Y_i}$$

Where

W_i = the weighted frequency for the total International travelers who gave answer i in the particular table. The W_i's are unique to each country and each table.

X_i = the frequency (number of respondents) who are in the non-USA column who gave answer i to the question tabulated in the particular table.

Y_i = similar to X_i, but for total USA travelers. Both X_i and Y_i are unique to each country and each table. The definitions of columns (USA, non-USA) are given in Appendix B, "Definitions and Use of Terms" of this report.

β_n and $\beta\mu$ are the proportions of non-USA travelers and of USA travelers, the weights shown in the previous table (e.g., for U.K. = .05). These $\beta\mu$'s are unique to each country.

The use of K assures that the sum of the weighted frequencies is equal to the sum of the unweighted frequencies. K is unique to each table (because of a differential nonresponse rate for different questions) and to each country.

3. *Sample Design.* The actual sample design involved four steps. The first was to pick a city or region in the selected country, then to pick several sections of that region, then to pick blocks, and finally to select dwelling units. The specific definitions and random procedures for doing this are described in following pages.

The purpose of this random part of the sampling was to obtain as representative a sample as possible. Many previous studies of international travelers used convenience samples of one kind or another—respondents referred by travel agents or tour agents, airport samples, buyers of new luggage, etc. This lowers the cost of interviewing but biases the sample and affects its representativeness in unknown and unmeasurable ways. Every attempt was made in this project to obtain as nearly random representative samples as possible.

Because the incidence of travelers to the USA is quite low (below one-half of one percent for most of the five countries surveyed) in the general population, it would have been prohibitive to obtain the full USA quota from the random sampling alone. Therefore, the random sample was supplemented only for USA visitors with a referral sample. Each qualified respondent who had visited the USA in 1976 was asked to refer the interviewer to others the respondent knew who had visited the USA in 1976. This referral process was carried to two levels, i.e., a random respondent (USA visitor) could refer a USA visitor who could also refer a USA visitor.

Instrument Development

The development of the survey research questionnaires for this study was a substantial project by itself. There were various requirements that had to be met, many of which pulled in opposite directions.

—The instruments should produce data comparable with previous studies, much of which were specific measures of transportation modes, detailed expenditure patterns, etc.

—The instruments should produce useful information on motivations and attitudes that can help produce better marketing plans.

—The sample should be representative of the entire travel population.

—The five countries' data should be comparable in meaning, though naturally adapted to local language, custom and nationalistic style.

—The need to keep the interview short, both for cost reasons and for reasons of respondent fatigue which increases the number of incomplete interviews and thoughtless answers.

Focus Groups. After reviewing previous research and examining the related literature several focus group sessions were conducted in each country. A focus group is a standard, well-developed, and frequently used marketing research technique. In it about a dozen typical respondents are brought together, with a professional moderator (often an experienced psychologist), who leads the free discus-

sion. The discussions explores the basic concepts, specific language to be used, customs, and searches for meaningful organization of the separate fragments. These group sessions often use structured questionnaires as a way of getting biographical and behavioral information from the participants.

The geographic destinations used to define these traveler segments were as follows:*

- Those travelers who visited *only* the United States on the 1976 trip analysed (USA only travelers).
- Those travelers who had visited other international countries as destinations in conjunction with their 1976 trip to the United States (USA-plus travelers).
- Those travelers who *did not* visit the United States in 1976, but who did travel to a destination outside of their *continent* of residence (non-USA *inter*continental travelers).
- Those travelers who *did not* visit the United States in 1976, but who did travel to a destination *within their own continent* of residence (non-USA *intra*continental travelers).

Findings from the literature review were used to develop a focus group guide. The purpose of this guide was to assure that sessions conducted in the various countries were uniform and provided the maximum data. This guide outlined the following:

- the specifications for the composition of the focus group sample;
- purpose of the sessions;
- procedures and equipment to be used; and
- specific areas of inquiry to be focused upon.

Hay consultants in the United Kingdom, France, West Germany and Mexico organized the groups. The groups were structured to balance the groups by both sex and socioeconomic status in order to facilitate group interaction. The groups were composed of between eight to twelve people of which a mix of 75% married travelers, 50% USA travelers, 25% intracontinental travelers, and 25% intercontinental travelers was strived for. In order to participate, a person had to have been a discretionary traveler within the past 12 months to either an intracontinental or intercontinental destination.*

Fuji National City Consulting, Hay's subcontractor for the field research portion of the study organized and conducted the sessions in Japan.

Four focus group sessions of approximately two to three hours in length were conducted in all countries except Japan. Two group sessions were conducted in Japan due to the study's time constraints.

Hay consultants conducted the sessions in all countries except Japan. The overriding objective in the conduct of these focus group sessions was to gather information which would allow the final survey instruments to be highly structured, and therefore provide in-depth market data without the use of open-ended questions, and yet develop a list of possible travel motivations, attitudes and decision-making factors without prejudicing or overlooking possible answers.

The results of the focus group sessions were then analyzed and used in developing the survey instruments. The input from these groups was used particularly in those sections that dealt with trip planning, attitudes toward travel, and the ideal trip activities, competitive travel destinations popular for these activities.

The Actual Instruments. Two survey instruments were developed for use in all countries: (1) for USA international travelers; and (2) for non-USA international travelers.

A third questionnaire was developed for the Mexican domestic traveler since this market segment was included in the survey in that country.

The instruments covered the following major content areas:

- trip planning and frequency;
- trip characteristics (i.e., season of travel, length of stay, purpose, etc.);
- trip planning;
- trip expenditures;
- trip activities and destination perceptions; and
- travel attitudes.

The instruments went through seven drafts before final questionnaires were presented to USTS for review. The purpose of these draft revisions was primarily to improve the flow of the questions and areas of coverage and to condense the length of the instruments.

* In the Mexican market only, those travelers who had not traveled outside of Mexico during 1976 but who had taken a trip of 200 kilometers or more which lasted 48 hours or more were analyzed. The geographic proximity of this country to the United States makes domestic travelers a major potential market segment.

* In Mexico only, Domestic travelers were included in the focus group sample.

Questionnaires were reviewed by the Research and Analysis Division of USTS and other USTS program offices throughout instrument development and prior to pretest in the field.

Translation, Pretest and Revision. The survey instruments were translated by the field survey subcontractors in each country. These translations were made in the country of survey in order to assure that the vocabulary used was current and clearly understandable by the respondent. In addition, certain culturally influenced items—such as occupation categories and educational categories—were modified for each country in order to clarify the questions. The translation was reviewed with USTS's field offices in each country.

The survey instruments were pretested in-house in the English version and then formally pretested in each country in the translated version. This pretest was conducted on a sample of travelers similar to those who would be included in the final survey. Both Hay Associates and its field research subcontractors conducted this pretest.

The survey instruments were then revised to correct for problems which appeared through the pretest. These revisions dealt primarily with:

(1) adjusting the wording of the questionnaires to avoid cultural differences;
(2) the development of a more compact list of attitudinal statements and trip activities; and
(3) the addition of a list of negative factors experienced by USA visitors.

A copy of each of the final questionnaires is provided in Appendix D of this volume.

Each questionnaire was pretested again to assure that there were no problems prior to agreeing on its final version.

Data Collection

The actual conduct of the interviews was subcontracted to Cegmark for the United Kingdom, France and West Germany, and to Fuji National City Consulting in Japan. In Mexico, the interviewing was conducted by a division of Hay Mexico that routinely performs survey research for many national and international clients.

In each country, the local Hay office served as direct liaison, and project personnel from the home office in the USA visited the sites.

Upon finalization of both the questionnaires and the sampling plan, the Manager of Survey Research for the project held briefing sessions with subcontractors in each country. These briefings detailed the final specification of the survey instruments and sample design and outlined procedures for status reports for quality control.

The interviewers who would conduct the study in the field were then briefed by the subcontractors' project supervisors and furnished with the materials for the survey. These interviews occurred in each of the five countries.

The field screening and interviewing of the actual survey respondents was conducted between the beginning of November, 1976 and the end of February, 1977. In order to locate eligible respondents for the survey, a screening guide had been developed and tested. It is shown in Appendix D of this volume.

Screening was done by random telephone calls in West Germany and the United Kingdom and by door-to-door interviews in France, Mexico and Japan. Interviews were conducted either at the time of the screening or at an appointed time which was convenient for the respondent. A disproportionate sampling methodology utilizing second level referrals was used to locate qualified respondents. The use of referrals was necessitated by the low incidence rate of travelers to the USA in most of the markets.

The number of completed interviews in each country was as follows: 2,615 in the United Kingdom, 2,447 in France, 2,512 in West Germany; 2,496 in Mexico; and 2,533 in Japan.

Detailed progress reports were prepared by the subcontractors and frequent phone and telex communications between USA project staff and interviewing supervisors cleared up problems of implementation or interpretation as they occurred.

As a routine part of the control process, a percentage of the respondents who completed questionnaires were recontacted by a validation interviewer (never the same as the orignal interviewer) and significant data was verified. This validation process was directly supervised by Hay local country offices.

MAJOR WORLD TOURISM REGIONS

Scandinavian Europe:	Denmark, Finland, Norway, Sweden
Continental Europe:	Alps, Austria, Belgium, Iceland, France, Luxembourg, Netherlands, Switzerland, West Germany
Eastern Europe:	Bulgaria, Czechoslovakia, East Germany, Hungary, Poland, Romania, Soviet Union
Southern and Mediterranean Europe:	Albania, Greece, Italy, Malta, Monaco, Portugal, Spain, Yugoslavia, Other Mediterranean
British Isles:	Ireland, United Kingdom
North Africa:	Algeria, Borocco
Other Africa:	Central African Republic, Ethiopia, Ivory Coast, Kenya, Liberia, Nigeria, South Africa, Tanzania, Zaire, Other Africa
Middle East:	Iraq/Iran, Israel, Lebanon, Saudi Arabia, Syria, Turkey, United Arab Emirates, Other (Egypt, Libya, Jordan, Yeman, Oman, Quatar)
South Asia:	India, Nepal, Pakistan, Other South Asia (Afganistan, Bhutan, Bangladesh, Sri Lanka (Ceylon), Burma)
Southeastern Asia:	Cambodia, Indonesia, Laos, Malaysia, Philippines, Singapore, Thailand, Vietnam
Far Eastern Asia:	China, Hong Kong, Korea, Taiwan
Japan	
Oceanea:	Australia, New Zealand
Pacific Islands (excluding U.S. territories/protectorates and Hawaii):	Western Samoa, Other Pacific Islands
Canada	
U.S.A.:	Guam, Hawaii, U.S. Mainland
Central America:	Costa Rica, El Salvadore, Guatemala, Honduras, Mexico, Nicaragua, Panama
South America:	Argentina, Bolivia, Brazil, Chile, Colombia, Ecuador, Paraguay, Peru, Venezuela, Other South America
West Indies:	Bermuda, Caribbean Islands

APPENDIX D

QUESTIONNAIRES

TRAVEL SURVEY—SCREENING GUIDE

Name of Respondent: _____

Respondent's Address _____

_____

Home Telephone: _____ Date: _____

Name of Interviewer: _____

Name of Supervisor: _____

Time Interview Started: _____ AM/PM (Circle)

Time Interview Ended: _____ AM/PM (Circle)

1. First of all, are you over 18?

   _____ Yes

   _____ No (If No, skip to Question 8)

2. Now, please think about various trips you may have taken outside (Country) during the calendar year 1976. Did you take *any* such trip—for any reason whatsoever—that involved travel outside (Country) more than 24 hours?

   _____ Yes

   _____ No (If No, skip to Question 7)

3. How many such trips did you take?

   _____ Trips

4. Now, starting from your most recent trip in 1976 outside (Country), what countries did you visit for at least one day each? Please tell me all the places you visited, starting with the four places in which you spent the longest time. (Interviewer: Record all places mentioned, with the four longest durations listed first for coding purposes. Repeat question to include up to Trip Number 6.)

Trip Number 1	**Trip Number 2**
_____	_____
_____	_____
_____	_____
_____	_____

Trip Number 3

_____
_____
_____
_____

Trip Number 4

_____
_____
_____
_____

Trip Number 5

_____
_____
_____
_____

Trip Number 6

_____
_____
_____
_____

(NEXT: (a) CHECK IF U.S. (SEE DEFINITION OF U.S.) IS MENTIONED. IF SO CLASSIFY RESPONDENT AS U.S. TRAVELER —

(b) IF U.S. IS NOT MENTIONED, CLASSIFY AS NON-U.S. TRAVELER.

1. Intercontinental _____
2. Intracontinental _____

5. Would it be possible to conduct a one-half hour interview with you now?

_____ Yes
_____ No

(IF YES, PROCEED TO EITHER U.S. TRAVELER OR NON-U.S. QUESTIONNAIRE, BASED ON ABOVE CLASSIFICATION.)

6. (IF NO.) May I set up an appointment to see you at some agreeable time during the next few days?

_____ Yes
Interview Time _____
Interview Date: _____
(RECORD AND SKIP TO QUESTION 8.)
_____ No (RECORD AND PROCEED TO QUESTION 7.)

7. Is there anyone else in your household who is at least 18 years old and has traveled at least once outside (Country) during the calendar year 1976?

_____ Yes
_____ No

(IF YES, AFTER ASKING QUESTION 8, CONTACT APPROPRIATE PERSON IN HOUSEHOLD, START WITH QUESTION 1 ON A NEW SCREENING GUIDE, IF NO, JUST PROCEED TO QUESTION 8).

8. Is there anyone *outside* your household who is at least 18 years old and has traveled at least once outside of (Country) during the calendar year 1976?

_____ Yes
_____ No (TERMINATE SCREENING INTERVIEW.)

9. Can you give me the name and addresses or telephone numbers of two of these people, who reside in different households?

Referral

Name 1: _____

Address: _____

_____

Telephone Number: _____

Name 2: _____

Address: _____

_____

Telephone Number: _____

From these referrals repeat screening to deduce second level referral

(THANKS FOR YOUR HELP.)

TRAVEL SURVEY—U.S. TRAVELER

(Circle Country of Origin)
1—UK
2—Germany
3—France
4—Japan
5—Mexico

(Circle Type of Traveler)
1—U.S. Traveler
2—Inter-Continental Traveler } Non-U.S. Traveler
3—Intra-Continental Traveler } Non-U.S. Traveler
4—Domestic Traveler

This questionnaire is to be used in all cases where respondent qualifies as U.S. traveler based on the Screening Guide Information.

Please transfer the following information from the respondent's Screening Guide to this page.

Screening Guide Questions

1. Respondent's age? (Q-1 FROM SCREENING GUIDE.)

   _____ Years

2. How many such trips did you take?

   _____ Trips

(NOTE: Interviewer. Copy information from the Screening Guide.)

3. Now, starting from your most recent trip outside (*COUNTRY*), what countries did you visit for at least one day each?
   (Note: Repeat question to include up to Trip Number 6.)

Trip Number 1	**Trip Number 4**
_____	_____
_____	_____
_____	_____
_____	_____

Trip Number 2

Trip Number 3

Trip Number 5

Trip Number 6

Travel Survey—U.S. Traveler

Name of Respondent: _____
Respondent's Address: _____
_____
Home Telephone: _____ Date: _____
Name of Interviewer: _____
Name of Supervisor: _____
Time Interview Started: _____ AM/PM (Circle)
Time Interview Ended: _____ AM/PM (Circle)

This survey is concerned with people's travel outside their own country during the calendar year 1976.

You have already stated that you have traveled to the U.S. at least once during the calendar year 1976. For purposes of this survey, let's consider only your *most recent* trip to the U.S. in calendar year 1976.

By "U.S." we mean *any* of the following:

- Mainland U.S.
- Alaska
- Hawaii
- Guam
- American Samoa
- Puerto Rico
- U.S. Virgin Islands

Part A: Characteristics of Your Most Recent Trip to the U.S. In Calendar Year 1976

1. In what month of 1976 did you begin your most recent trip to the U.S.? (CIRCLE NUMBER ONLY)

01	January	07	July
02	February	08	August
03	March	09	September
04	April	10	October
05	May	11	November
06	June	12	December

2. How many days, *in total,* did the *round-trip* take?

   _____ days, in total

3. Of that total, how many days were spent in the U.S.?

   _____ Days spent in U.S.

4. What parts of the U.S. (or its territories) did you visit, and how many days did you stay in each area? (Please cricle all that apply. NOTE: Days should add up to total spent in USA.)

   1. Mainland U.S.
      _____ Number of days
   2. Alaska
      _____ Number of days
   3. Hawaii
      _____ Number of days
   4. Guam
      _____ Number of days
   5. American Samoa
      _____ Number of days
   6. Puerto Rico
      _____ Number of days
   7. U.S. Virgin Islands
      _____ Number of days

5. (ASK ONLY OF RESPONDENTS WHO CHECKED MAINLAND U.S. IN QUESTION A–4.) Considering the *Mainland U.S. only*, which of these places did you visit? (SHOW RESPONDENT CARD A–5 THAT IS MARKED MAINLAND U.S. MAP) Can you estimate how many days you stayed in each location?

States	*Number of Days*	*States*	*Number of Days*
Alabama	( )	Nebraska	( )
Arizona	( )	Nevada	( )
Arkansas	( )	New Hampshire	( )
California	( )	New Jersey	( )
Colorado	( )	New Mexico	( )
Connecticut	( )	New York	( )
Delaware	( )	North Carolina	( )
District of Columbia	( )	North Dakota	( )
Florida	( )	Ohio	( )
Georgia	( )	Oregon	( )
Idaho	( )	Oklahoma	( )
Illinois	( )	Pennsylvania	( )
Indiana	( )	Rhode Island	( )
Iowa	( )	South Carolina	( )
Kansas	( )	South Dakota	( )
Kentucky	( )	Tennessee	( )
Louisiana	( )	Texas	( )
Maine	( )	Utah	( )
Maryland	( )	Vermont	( )
Massachusetts	( )	Virginia	( )
Michigan	( )	Washington	( )
Minnesota	( )	West Virginia	( )
Mississippi	( )	Wisconsin	( )
Missouri	( )	Wyoming	( )
Montana	( )		

City/Location	*Number of Days*	*City/Location*	*Number of Days*
Abilene	( )	Nashville	( )
Albuquerque	( )	New Orleans	( )
Atlanta	( )	New York City	( )
Baltimore	( )	Niagara Falls	( )
Boston	( )	Oklahoma City	( )
Chicago	( )	Omaha (NEB)	( )
Cincinnati	( )	Philadelphia	( )
Cheyene (Wyoming)	( )	Phoenix	( )
Cleveland	( )	Pittsburgh	( )
Dallas/Fort Worth	( )	Rapid City (S. DAK)	( )
Des Moines (IOWA)	( )	Reno	( )
Detroit	( )	Rocky Mountain	( )
Disneyland	( )	St. Louis	( )
Disney World/Orlando	( )	Salt Lake City	( )
Grand Canyon	( )	San Antonio	( )
Houston	( )	San Diego	( )
Kansas City	( )	San Francisco	( )
Las Vegas	( )	Seattle	( )
Little Rock (ARK)	( )	Tampa (FLA)	( )
Los Angeles	( )	Tucson	( )
Louisville (KY)	( )	Tulsa	( )
Memphis	( )	Yellow Stone Park (MONTANA)	( )
Miami	( )	Others _____	( )
Milwaukee	( )	_____	
Minneapolis	( )		

6. What were the main purposes of this most recent trip to the U.S. (CIRCLE ALL THAT APPLY)

1. Business
2. Attend Convention
3. Study/Formal Schooling
4. Vacation
5. Visiting Relatives
6. Visiting Friends
7. Personal Affairs
8. Inspection of Culture*
9. Other (please specify): _____

_____

*Applies only to Japanese respondents.

Part B: Trip Details

1. Let's continue to discuss your most recent (calendar year 1976) trip to the U.S. Besides yourself, who was in your most immediate traveling party?

Member of Your Party	Relationship to You	Sex	Approximate Age
1			
2			
3			
4			
5			
6			
* 7			

(MEMBERS OF PARTY CAN INCLUDE FRIENDS AND ASSOCIATES AS WELL AS RELATIVES.)

*If more than 7, record total number of people in traveling party.

_____Total Number in Party

2. If you traveled by public transportation to your U.S. destination, what type of primary fare was purchased? (CIRCLE ALL THAT APPLY)

   1. First Class
   2. Regular Economy/Coach
   3. Discount/Excursion Fare (other than Charter)
   4. Charter Fare (where the plane is expressly hired for the specific flight)
   5. Tour Package (where at least cost of accommodation is included)

3. Did your fare include any of the following extras? (CIRCLE ALL THAT APPLY)

   1. Lodging
   2. Meals
   3. Sightseeing
   4. Transportation to and From Arrival Point to Lodging
   5. Car Rental
   6. None of These
   7. Other (please specify) _____

4. While traveling inside the U.S., what type of transportation did you use? (CIRCLE ALL THAT APPLY)

   1. Air
   2. Boat
   3. Rail
   4. Personal Car
   5. Bus or Tour Bus
   6. Taxi
   7. Rented Car
   8. Camper
   9. Other (please specify) _____

5. Insofar as lodging is concerned, where did you stay? (CIRCLE ALL THAT APPLY)

1. First Class Hotel
2. Medium-priced Hotel/Motel
3. Budget or Economy Hotel/Motel
4. Tourist Home or Rooming House
5. Private Home
6. Youth Hostel/Dormitory
7. Camping Site.
8. Mobile Home/Camper
9. Other (please specify) _____

_____

Part C: Planning the Trip

1. Now, let's talk about the kinds of things that went into the planning of your most recent 1976 trip to the U.S. In making reservations for your trip, which of these organizations did you have direct contact with insofar as *planning* the trip was concerned?

1. Transportation Carrier (e.g., the Airline) (SKIP TO 2b)
2. Travel Agency (SKIP TO 2a)
3. Your Company's Travel Department
4. Travel Club
5. Tour Operator
6. Did not make reservation Other (please specify)

(SKIP TO 2b)

_____

_____

2a. If you contacted a travel agency, which of the following services *were performed for you by that agency* before you left home? (CIRCLE ALL THAT APPLY)

1. Arranged primary transportation (e.g., air)
2. Arranged lodging
3. Arranged sightseeing trips
4. Arranged car rental for side trips
5. Provided complete tour package
6. Helped select countries/cities visited
7. Provided information
8. Other (please specify) _____

_____

2b. Which of the following services did you personally arrange? (CIRCLE ALL THAT APPLY)

1. Arranged primary transportation (e.g., air)
2. Arranged lodging
3. Arranged sightseeing trips
4. Arranged car rental for side trips
5. Other (please specify) _____

_____

3. How long before you left did you start making *specific plans* (e.g., making contact with a travel agency, itinerary planning) for your trip? (CIRCLE ONLY ONE)

   1. Less than 1 week
   2. 1 week to less than 2 weeks
   3. 2 weeks to less than 1 month
   4. 1 month to less than 2 months
   5. 2 to 4 months
   6. 4 to 6 months
   7. Over 6 months

4. Did the U.S. Bicentennial celebration influence the specific planning of your U.S. itinerary?

   1. No
   2. Yes

5. If YES, which of these places (SHOW CARD A-5 AGAIN) did you visit primarily because of the Bicentennial?

   _____

   _____

   _____

Part D: Trip Expenditures

1. Still thinking about this same trip, what do you estimate was the total cost of the entire trip for you alone? (i.e., including everything you spent before and during the trip: transportation, accommodations, souvenirs, etc.)

   _____Approximate Cost

2. Did your trip involve a tour package that included such things as lodging, ground transportation, meals, or sightseeing, in addition to basic (e.g., air) transportation?

   1. No (SKIP TO QUESTION D-5)
   2. Yes

3. (Tour Traveler) (If Yes to Question D-2) To the best of your recollection, what was the *basic tour price for your trip alone,* not counting anyone else?

   _____Approximate Cost for Basic Tour

4. (Tour Traveler) (If Yes to Question D-2) *While in the U.S.,* to the best of your recollection, how much did you spend, not counting the basic tour cost, for yourself alone?

   _____Approximate Cost

   and what was the approximate percentage of this total that was spent on:

Additional Transportation (Not included in tour price	_____	Should add up to 100%
Lodging and Food (not included in tour price)	_____	
Gifts, Souvenirs, Other Purchases	_____	
Entertainment (not included in tour price)	_____	
Miscellaneous—Sightseeing, Gratuities, etc. (not included in tour price)	_____	

5. (Non-Tour Traveler) (If No to Question D-2) *While in the U.S.*, to the best of your recollection, how much of that total did you spend?

_____Approximate Total Cost

and what was the approximate percentage of this total that was spent on:

Transportation in the U.S.	_____	Should Add to 100%
Lodging and Food	_____	
Gifts, Souvenirs, Other Purchases	_____	
Entertainment	_____	
Miscellaneous—Sightseeing, Gratuities, etc.	_____	

6. About what percentage of your total expenditures, while on the trip, was paid for by some type of Travelers' Checks?

_____ Percent

8. Thinking back over your last trip to the U.S., which of these types of *information* (SHOW CARD D-8) do you think was (or would have been) most helpful to planning your trip? Please pick out what you believe to be the *three* most helpful information types? (CIRCLE THOSE THREE TYPES CHOSEN BY RESPONDENT TO BE MOST HELPFUL.)

1. Transportation Schedules
2. Alternative Fare Packages
3. Tour Group Availability
4. Lodging Availability and Prices
5. Restaurant and Entertainment Places and Prices
6. Internal Travel Arrangements
7. Scenic Places to Visit
8. Exchange Rates
9. Customs/Entry Regulations
10. Weather/Climate
11. Recent Economic Trends and Currency Devaluation Trends

9. Did you get any information about the U.S. from any of the following sources? If so, how would you rate its usefulness—poor, fair, or good? (PLEASE CIRCLE AND EVALUATE ALL THAT APPLY)

	Poor	*Fair*	*Good*	*Did Not Use*
Travel Agent	1	2	3	4
Tour Operator/Wholesaler	1	2	3	4
U.S. Government Tourist Office	1	2	3	4
Airline Company Offices	1	2	3	4
Embassies	1	2	3	4
Articles in Newspapers and Magazines, or TV and Cinema Documentaries	1	2	3	4
Paid Advertising	1	2	3	4
Friends and Relatives	1	2	3	4

Part E: Your Trip Activities

1. You identified _____ as the U.S. reigon you had visited the longest (REFER TO QUESTION A-4). Let's talk about the things you did there. Here is a group of cards that list activities (SHOW SET OF E-1 CARDS). Please sort them into two piles—those you did, and those you did not do.

Destination: _____ (CIRCLE NUMBER)

	Did Do	*Did Not Do*
a. Experienced a new culture and way of life.	1	2
b. Enjoyed an exciting night life of good restaurants, dancing and entertainment.	1	2
c. Visited places of significant historical interest.	1	2
d. Saw beautiful scenery.	1	2
e. Met interesting new people.	1	2
f. Learned new things that would be helpful in one's business or social life.	1	2
g. Experienced a bargain-priced vacation.	1	2
h. Bought interesting gifts and souvenirs.	1	2
i. Participated in warm-weather sports or lay in the sunshine.	1	2
j. Participated in winter sports and activities.	1	2
k. Attended a bicentennial event/site	1	2
l. Went camping.	1	2
m. Went snow skiing.	1	2

2. Now, let talk about your next trip abroad—to *whatever* that destination* might be. It could be another trip to the U.S. or it could be some entirely different *foreign* destination. Please look at this card (SHOW RESPONDENT CARD E-2).

Let's take each statement—one at a time.

For example, in your opinion, what *foreign* destination, of all of those that come to mind, offers its visitor the greatest chance:

"To experience a different culture and way of life."

(*NOTE: Destination can be any foreign country/city.)

(RECORD RESPONSE BELOW.) Please continue until you have named some destination that, in your opinion, best matches each of the statements on the card. You may use the same destination name more than once.

	Destination Named by Respondent
a. To experience a different culture and way of life.	_____
b. To enjoy an exciting night life of good restaurants, dancing and entertainment.	_____
c. To visit places of significant historical interest.	_____
d. To see beautiful scenery.	_____
e. To meet interesting new people.	_____
f. To learn new things that would be helpful in one's business or social life.	_____
g. To get a bargain-priced vacation.	_____
h. To bring back interesting gifts and souvenirs.	_____
i. To participate in warm weather sports or lay in the sunshine.	_____
j. To participate in winter sports and activities.	_____
k. To experience a relaxing atmosphere.	_____
l. To participate in outdoor activities like hiking and camping.	_____

3. Now, thinking about *all* of the foreign countries that you have visited over the past several years, which one would you most like to visit again?

_____Have never visited a foreign country
_____(Country)

4. Thinking about countries you have *never visited before*, which one would you most like to visit in the future?

_____(Country)

5. If you are going to the USA for the first time or for a re-visit, which of the following places would you prefer to visit first, second, third? (SHOW CARD A-5).

1. _____
2. _____
3. _____

6. Thinking about your most recent trip to the U.S., did any of the following represent major problems or difficulties on your trip?

	Yes	*No*	*Don't Know*
1. Unfriendliness	1	2	3
2. Poor weather	1	2	3
3. Difficult entry procedure (obtaining visa)	1	2	3
4. Overcrowding	1	2	3
5. Fear of personal safety	1	2	3
6. High cost—expensive	1	2	3
7. Inadequate tourist information/facilities	1	2	3
8. Difficulty of getting around	1	2	3
9. Other: _____	1	2	3

Part F: Attitude Toward Traveling

Next, we would like to get some idea of your general attitudes toward travel and vacations. Please look over the following statements. (SHOW RESPONDENT RECORDING FORM BELOW.) Please read each statement, one at a time. If you strongly disagree with it, circle the "1" in the appropriate column. If you somewhat disagree with it, circle the "2". If you somewhat agree, circle the "3". If you strongly agree, circle the "4".

There are no right or wrong answers to any of these statements. Just record your first reactions and proceed right away to the next statement.

	Strongly Disagree	*Somewhat Disagree*	*Somewhat Agree*	*Strongly Agree*
a. One of the best parts of a vacation is telling your friends about it when you get home.	1	2	3	4
b. When I travel abroad, I prefer to be on a guided tour.	1	2	3	4
c. The nicest vacation is one where I can just relax and do nothing.	1	2	3	4
d. When I go on vacation, I look for adventure and an opportunity to escape from the ordinary.	1	2	3	4
e. The best vacations are those that have a lot of night life.	1	2	3	4
f. It is important that I stay at the best places when on vacation.	1	2	3	4
g. I prefer to visit a new country on each trip I take.	1	2	3	4
h. One of the best parts of a trip is planning the whole trip out in advance.	1	2	3	4
i. I prefer to visit countries that have old monuments and other historical buildings.	1	2	3	4
j. I always like to mix with the local people and experience the local customs.	1	2	3	4
k. I most like to visit places that my friends have visited before me.	1	2	3	4
l. I'd rather take a longer vacation trip with fewer luxuries than a shorter, more extravagant one.	1	2	3	4
m. One of the best parts of traveling is to visit new cultures and new ways of living.	1	2	3	4
n. When I go on a trip I prefer to arrange my own sightseeing schedule and accommodations.	1	2	3	4
o. Whenever I travel I spend a lot of time looking for bargain purchases.	1	2	3	4
p. Most of my friends come to me for advice on what foreign countries to visit.	1	2	3	4
q. I like to visit places where I've been able to learn things that help me in education and/or business.	1	2	3	4
r. I try to do too many things when I am on a vacation.	1	2	3	4

Part G: Background Information

You've been most helpful during the interview and this is the last section of it. We would like to ask you just a few background questions for statistical purposes only.

1. What is your marital status? (CIRCLE ONE)

   1. Single
   2. Married
   3. Separated/Divorced
   4. Widowed

2. How old are you?

   _____ Years (CHECK AGAINST SCREENING QUESTION.)

3. Sex (NOTED BY INTERVIEWER)

   1. Male
   2. Female

4. Including yourself, how many people live in this household?

   _____ Number in household

5. Of these, how many are children under 18 years old?

   _____Number under 18 years old

6. What is the formal education level *of the person who was the primary decision-maker* for the trip? (CIRCLE ONE)

   1. Elementary/Primary School
   2. High School/Secondary School
   3. Technical/Special Vocational School
   4. College/University

7. Please look at this occupations card. (SHOW CARD G–7.) Which occupation on this card comes closest to describing the occupation of *the person who was the primary decision-maker* for the trip? (CIRCLE ONE.)

   01 Professional
   02 Executive/Management
   03 Clerical
   04 Student
   05 Sales/Merchant
   06 Factory Worker
   07 Farmer
   08 Self Employed
   09 Retired/Unemployed
   10 None of these (please specify): _____

8. Please look at this card of annual income before taxes (SHOW CARD G–8). Which category comes closest to your own household's annual income? (ENTER NATIVE COUNTRY'S EQUIVALENT MONETARY VALUES.) (CIRCLE ONE.)

1. Less than $5,000
2. $5,000–$9,999
3. $10,000–$14,999
4. $15,000–$19,999
5. $20,000–$24,999
6. $25,000–$34,999
7. $35,000–$49,999
8. $50,000 and over

9. What languages can you *speak* or *read?*
1. English
2. French
3. German
4. Spanish
5. Italian
6. Japanese
7. Other (please specify): _____

THANKS VERY MUCH FOR ALL YOUR HELP.

TRAVEL SURVEY—NON-U.S. TRAVELERS

(Circle Country of Origin)
1—UK
2—Germany
3—France
4—Japan
5—Mexico

(Circle Type of Traveler)
1—U.S. Traveler
2—Inter-Continental Traveler
3—Intra-Continental Traveler
} ——→ Non-U.S. Traveler
4—Domestic Traveler

This questionnaire is to be used in all cases where respondent qualifies as Non-U.S. Traveler based on the Screening Guide information.

Please transfer the following information from the respondent's Screening Guide to this page.

1. Respondent's age? (Q–1 FROM SCREENING GUIDE.)

   _____ Years

2. How many such trips did you take?

   _____ Trips

(NOTE: Interviewer. Copy information from the Screening Guide.)

3. Now, starting from your most recent trip in 1976 outside (COUNTRY) what countries did you visit for at least one day each? (Interviewer: Repeat question to include up to Trip Number 6.)

Trip Number 1	**Trip Number 4**
_____	_____
_____	_____
_____	_____
_____	_____

Trip Number 2

Trip Number 3

Trip Number 5

Trip Number 6

Travel Survey—Non-U.S. Traveler

Name of Respondent: _____
Respondent's Address: _____
_____
Home Telephone: _____ Date: _____
Name of Interviewer: _____
Name of Supervisor: _____
Time Interview Started: _____ AM/PM (Circle)
Time Interview Ended _____ AM/PM (Circle)

This survey is concerned with people's travel outside their own country during the calendar year 1976.

(ASK NEXT QUESTION OF ALL RESPONDENTS PREVIOUSLY CLASSIFIED AS *"INTERCONTINENTAL"* OR *"INTRA*CONTINENTAL".)

You have already stated at least one trip was outside your country. Which of these trips in calendar year 1976 involved the longest number of days? (RECORD)

_____ Trip Number

Please refer to this specific trip for the following questions.

Part A: Characteristics of Your Longest Trip in Calendar Year 1976

1. In what month of 1976 did you begin your principal trip? (CIRCLE NUMBER ONLY)

01	January	07	July
02	February	08	August
03	March	09	September
04	April	10	October
05	May	11	November
06	June	12	December

2. How many days, *in total,* did the *round-trip* take?

_____ Days, in total

3. Of that total, how many days were spent in principal destination? (i.e., country where you spent the most time)

_____ Days spent in *COUNTRY*
_____ Country

(QUESTIONS A–4 AND A–5 ARE ASKED OF U.S. TRAVELERS *ONLY*)

6. What were the main purposes of this trip? (CIRCLE ALL THAT APPLY)

1. Business
2. Attend Convention
3. Study/Formal Schooling
4. Vacation
5. Visiting Relatives
6. Visiting Friends
7. Personal Affairs
8. Inspection of Culture*
9. Other (please specify): _____

_____

* Applies only to Japanese respondents.

Part B: Trip Details

1. Let's continue to discuss your longest (calendar year 1976) trip outside your country. Besides yourself, who was in your most immediate traveling party? (Family, Friends, Colleagues, etc.)

Member of Your Party	Relationship to You	Sex	Approximate Age
1			
2			
3			
4			
5			
6			
* 7			

MEMBERS OF PARTY CAN INCLUDE FRIENDS AND ASSOCIATES AS WELL AS RELATIVES.)

*If more than 7, record total number of people in traveling party.

_____Total Number in Party

2. If you traveled by public transportation to your destination, what type of primary fare was purchased? (CIRCLE ALL THAT APPLY)

1. First Class
2. Regular Economy/Coach
3. Discount/Excursion Fare (other than Charter)
4. Charter Fare (where the plane is expressly hired for the specific flight)
5. Tour Package (where at least cost of accommodation is included)

3. Did your fare include any of the following extras? (CIRCLE ALL THAT APPLY)

1. Lodging
2. Meals
3. Sightseeing
4. Transportation to and From Arrival Point to Lodging
5. Car Rental
6. None of These
7. Other (please specify) _____

_____

4. While on this trip, what principal types of transportation did you use? (CIRCLE ALL THAT APPLY)

1. Air
2. Boat
3. Rail
4. Camper
5. Bus or Tour Bus
6. Rental Car
7. Personal Car
8. Other

5. Insofar as lodging is concerned, where did you stay? (CIRCLE ALL THAT APPLY)

1. First Class Hotel
2. Medium-priced Hotel/Motel
3. Budget or Economy Hotel/Motel
4. Tourist Home or Rooming House
5. Private Home
6. Youth Hostel/Dormitory
7. Camping Site
8. Mobile Home/Camper
9. Other (please specify) _____

_____

Part C: Planning the Trip

1. Now, let's talk about the kinds of things that went into the planning of your principal trip in 1976. In making reservations for your trip, which of these organizations did you have direct contact with insofar as *planning* the trip was concerned?

1. Transportation Carrier (e.g., the Airline) (SKIP TO 2b)
2. Travel Agency (SKIP TO 2a)
3. Your Company's Travel Department
4. Travel Club
5. Tour Operator
6. Did not make reservation/Other (please specify)

_____

_____

(SKIP TO 2b)

2a. If you contacted a travel agency, which of the following services *were performed for you by that agency* before you left home? (CIRCLE ALL THAT APPLY)

1. Arranged primary transportation (e.g., air)
2. Arranged lodging
3. Arranged sightseeing trips
4. Arranged car rental for side trips
5. Provided complete tour package
6. Helped select countries/cities visited
7. Provided information
8. Other (please specify) _____

_____

2b. Which of the following services did you personally arrange? (CIRCLE ALL THAT APPLY)

1. Arranged primary transportation (e.g., air)
2. Arranged lodging
3. Arranged sightseeing trips
4. Arranged car rental for side trips
5. Other (please specify) _____

3. How long before you left did you start making *specific plans* (e.g., making contact with a travel agency itinerary planning) for your trip? (CIRCLE ONLY ONE.)

1. Less than 1 week
2. 1 week to less than 2 weeks
3. 2 weeks to less than 1 month
4. 1 month to less than 2 months
5. 2 to 4 months
6. 4 to 6 months
7. Over 6 months

4. Did the U.S. Bicentennial influence your decision *not* to visit the U.S.?

1. No
2. Yes

5. If *Yes*, in what way?

1. Too crowded
2. Too expensive
3. Unappealing advertising
4. Crime
5. Other (please specify) _____

_____

Part D: Trip Expenditures

1. Still thinking about this same trip, what do you estimate was the total cost of the entire trip for you alone? (i.e., including everything you spent before and during the trip: transportation, accommodations, souvenirs, etc.)

   _____Approximate Cost

2. Did your trip involve a tour package that included such things as lodging, ground transportation, meals, or sightseeing, in addition to basic (e.g., air) transportation?

   1. No (SKIP TO QUESTION D–6)
   2. Yes

3. (Tour Traveler) (If Yes to Question D–2,) to the best of your recollection, what was the *basic tour price for your trip alone,* not counting anyone else?

   _____Approximate Cost for Basic Tour

(QUESTIONS 4 and 5 ARE ASKED OF U.S. TRAVELERS *ONLY*)

6. About what percentage of your total expenditures, while on the trip was paid for by some type of Traveler's Checks?

   Percent_____%

Part E: Your Trip Activities

1. You identified _____ as the country you had visited the longest (REFER TO QUESTION A–3). Let's talk about the things you did there. Here is a group of cards that list activities (SHOW SET OF E–1 CARDS). Please sort them into two piles—those you did, and those you did not do.

Destination: _____ (CIRCLE NUMBER)

	Did Do	*Did Not Do*
a. Experienced a new culture and way of life.	1	2
b. Enjoyed an exciting night life of good restaurants, dancing and entertainment.	1	2
c. Visited places of significant historical interest.	1	2
d. Saw beautiful scenery.	1	2
e. Met interesting new people.	1	2
f. Learned new things that would be helpful in one's business or social life.	1	2
g. Experienced a bargain-priced vacation.	1	2
h. Bought interesting gifts and souvenirs.	1	2
i. Participated in warm-weather sports or lay in the sunshine.	1	2
j. Participated in winter sports and activities.	1	2
k. Attended a major national event such as U.S. Bicentennial or French Bastille Day, or St. Guadalope.	1	2
l. Went camping.	1	2
m. Went snow skiing	1	2

2. Now, let's talk about your next trip abroad— to whatever foreign destination.* It could be another trip like the one you mentioned, or it could be some entirely different foreign destination. Please look at this card (SHOW RESPONDENT CARD E–2).

Let's take each statement—one at a time.

For example, in your opinion, what *foreign* destination, of all of those that come to mind, offers its visitor the greatest chance:

"To experience a different culture and way of life."

(RECORD RESPONSE BELOW.) Please continue until you have named some destination that, in your opinion, best matches each of the statements on the card. You may use the same destination name more than once.

(*NOTE: Destination can be any foreign country/city.)

	Destination Named by Respondent
a. To experience a different culture and way of life.	_____
b. To enjoy an exciting night life of good restaurants, dancing and entertainment.	_____
c. To visit places of significant historical interest.	_____
d. To see beautiful scenery.	_____
e. To meet interesting new people.	_____
f. To learn new things that would be helpful in one's business or social life.	_____
g. To get a bargain-priced vacation.	_____
h. To bring back interesting gifts and souvenirs.	_____
i. To participate in warm-weather sports or lay in the sunshine.	_____
j. To participate in winter sports and activities.	_____
k. To experience a relaxing atmosphere.	_____
l. To participate in outdoor activities like hiking and camping.	_____

3. Now, thinking about *all* of the foreign countries that you have visited over the past several years, which one would you most like to visit again?

_____(Country)

4. Thinking about countries you have *never visited before,* which one would you most like to visit in the future?

_____(Country)

5. If you are going to the USA for the first time or for a re-visit, which of the following places would you prefer to visit first, second, third? (SHOW CARD A–5.)

1. _____
2. _____
3. _____

(QUESTION 6 IS ASKED OF U.S. TRAVELER *ONLY*.)

7. Thinking back over your last 1976 trip, which of these types of *information* (SHOW CARD D–8) do you think was (or would have been) most helpful to planning your trip? Please pick out what you believe to be the *three* most helpful information types? (CIRCLE THOSE *THREE* TYPES CHOSEN BY RESPONDENT TO BE MOST HELPFUL.)

1. Transportation Schedules
2. Alternative Fare Packages
3. Tour Group Availability
4. Lodging Availability and Prices
5. Restaurant and Entertainment Places and Prices
6. Internal Travel Arrangements
7. Scenic Places to Visit
8. Exchange Rates
9. Customs/Entry Regulations
10. Weather/Climate
11. Recent Economic Trends and Currency Devaluation Trends

(QUESTION 8 IS ASKED OF U.S. TRAVELERS *ONLY*)

Part F: Attitude Toward Traveling

Next, we would like to get some idea of your *general* attitudes toward travel and vacations. Please look over the following statements. (SHOW RESPONDENT RECORDING FORM BELOW.) Please read each statement, one at a time. If you strongly disagree with it, circle the "l" in the appropriate column. If you somewhat disagree with it, circle the "2". If you somewhat agree, circle the "3". If you strongly agree, circle the "4".

There are no right or wrong answers to any of these statements. Just record your first reactions and proceed right away to the next statement.

	Strongly Disagree	*Somewhat Disagree*	*Somewhat Agree*	*Strongly Agree*
a. One of the best parts of a vacation is telling your friends about it when you get home.	1	2	3	4
b. When I travel abroad, I prefer to be on a guided tour.	1	2	3	4
c. The nicest vacation is one where I can just relax and do nothing.	1	2	3	4
d. When I go on vacation, I look for adventure and an opportunity to escape from the ordinary.	1	2	3	4
e. The best vacations are those that have a lot of night life.	1	2	3	4
f. It is important that I stay at the best places when on vacation.	1	2	3	4
g. I prefer to visit a new country on each trip I take.	1	2	3	4
h. One of the best parts of a trip is planning the whole trip out in advance.	1	2	3	4
i. I prefer to visit countries that have old monuments and other historical buildings.	1	2	3	4
j. I always like to mix with the local people and experience the local customs.	1	2	3	4
k. I most like to visit places that my friends have visited before me.	1	2	3	4
l. I'd rather take a longer vacation trip with fewer luxuries than a shorter, more extravagant one.	1	2	3	4
m. One of the best parts of traveling is to visit new cultures and new ways of living.	1	2	3	4
n. When I go on a trip I prefer to arrange my own sightseeing schedule and accommodations.	1	2	3	4
o. Whenever I travel I spend a lot of time looking for bargain purchases.	1	2	3	4
p. Most of my friends come to me for advice on what foreign countries to visit.	1	2	3	4
q. I like to visit places where I've been able to learn things that help me in education and/or business.	1	2	3	4
r. I try to do too many things when I am on vacation.	1	2	3	4

Part G: Background Information

You've been most helpful during the interview and this is the last section of it. We would like to ask you just a few background questions for statistical purposes only.

1. What is your marital status? (CIRCLE ONE)

   1. Single
   2. Married
   3. Separated/Divorced
   4. Widowed

2. How old are you?

   _____ Years (CHECK AGAINST SCREENING QUESTION.)

3. Sex (NOTED BY INTERVIEWER)

   1. Male
   2. Female

4. Including yourself, how many people live in this household?

   _____ Number in household

5. Of these, how many are children under 18 years old?

   _____ Number under 18 years old

6. What is the formal education level of *the person who was the primary decision-maker* for the trip? (CIRCLE ONE)

   1. Primary School
   2. Secondary School
   3. Technical/Special Vocational School
   4. University

7. Please look at this occupations card. (SHOW CARD G–7.) Which occupation on this card comes closest to describing the occupation of *the person who was the primary decision-maker* for the trip? (CIRCLE ONE.)

   01 Professional
   02 Executive/Management
   03 Clerical
   04 Student
   05 Sales/Merchant
   06 Factory Worker
   07 Farmer
   08 Self Employed
   09 Retired/Unemployed
   10 None of these (please specify): _____

8. Please look at this card of annual income before taxes (SHOW CARD G–8). Which category comes closest to your own household's annual income? (ENTER NATIVE COUNTRY'S EQUIVALENT MONETARY VALUES.) (CIRCLE ONE.)

   1. Less than $5,000
   2. $5,000–$9,999
   3. $10,000–$14,999
   4. $15,000–$19,999
   5. $20,000–$24,999
   6. $25,000–$34,999
   7. $35,000–$49,999
   8. $50,000 and over

9. What languages can you *speak* or *read*?
   1. English
   2. French
   3. German
   4. Spanish
   5. Italian
   6. Japanese
   7. Other (please specify): _____

THANKS VERY MUCH FOR ALL YOUR HELP.

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